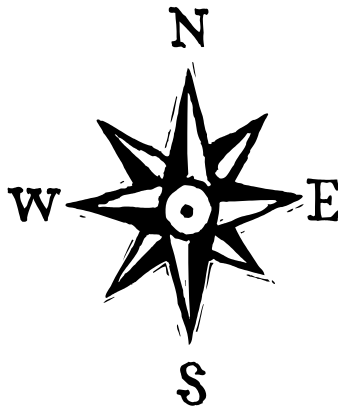


---

# *Utah!*

Division of Travel Development



Marketing Plan  
Short-Term Tactics  
Current Media Plan

May, 2003

---

# Table of Contents

<b>I-</b>	<b>The Division of Travel Development</b>	
	Roles – What We Do	4
	Positioning Utah As A Destination	5
	This Document And The Strategic Plan	6
	The Strategic Planning Tree – Mission And Goals	7
	Division Staff	9
<b>II-</b>	<b>Situation Analysis – Tourism In Utah</b>	
	Overview And 2002 Summary	14
	Impact of the 2002 Olympic Winter Games	16
	2003 Outlook	18
	Visitor Make-Up	19
	Why Visitors Choose Utah	23
	Travel And Consumer Trends	26
<b>III-</b>	<b>Program Overviews</b>	
	Trade Development And Public Relations	30
	<i>Situation Analysis, International Markets, Trade Show Involvement, Media</i>	
	In-State Programs	39
	<i>Publications, Information Services, In-State Communications, Interagency Coordination</i>	
	The Internet and Utah	41
	<i>Overview, Government Site, utah.com</i>	
	Research And Planning Program	43
	<i>Overview, Research Series, Long-Range Strategic Plan, This Plan, Utah! Travel Barometer</i>	
<b>IV-</b>	<b>The 1,000 Day Plan</b>	46
<b>V-</b>	<b>Advertising Utah!</b>	
	Overview, Strategy, Primary Target	49
	Advertising Campaigns	50
	Advertising Accountability	56
	Coordinating Destination Advertising With The <i>Utah!</i> Brand	59
	Advertising Co-Branding	59
	Advertising Co-Ops	59
	Current Advertising Campaign	60
	Advertising Direction – Fiscal 04	76

## **Section I**



# The Division Of Travel Development



# Roles - What We Do

The Division of Travel Development's mission is to *make Utah a better place to live by increasing the economic contribution of tourism.*

In other words, the Division's charge is to help improve the quality of life for Utah residents through the economic activity derived from purchases made by out-of-state visitors, and through the intangible benefits that come from the cultural exchange intrinsic in tourism. Also, as a compliment to county- or destination-based tourism promotion, the Division's role is to position the "*Utah!* Brand".

Tourism contributes over \$4 billion to Utah's economy each year.

As a Division we support tourism businesses and destination marketing partners in the following capacities:

## **Scanner**

*Investigating, finding, observing, defining, developing, and interpreting information, which describes the economic condition of the tourism sector; providing the raw material for situation analysis*

We scan, manage, and disseminate key insights from data, trends, and regularly published research. We interpret and analyze the condition of the tourism economic sector. This information is used by other public sector decision-makers, private businesses, investors, and analysts.

## **Convener**

*Assembling the various participants in the tourism community to identify and take advantage of opportunities of commonality. Cooperation and collaboration are the desired outcomes of convening*

We identify common objectives, which, if pursued together, can create an efficient, consistent message and communications theme.

## **Facilitator**

*Providing assistance, support, encouragement; generating demand for destinations through effective promotion of the Utah! Brand*

One of the functions of the Division's branding efforts is to generate demand for the Utah tourism product in the face of superb competition. This assignment falls

to state government in part because most destinations' energy and resources are dedicated to that particular destination, rather than coverage of the collective interests.

## Positioning Utah As A Destination

All of the programs conducted by the Division of Travel Development work toward the goal of promoting Utah as a preferred destination. The “backdrop” of the Division’s programs is promotion of the *Utah!* Brand.

### **What Is “Branding”?**

Branding is simply making a promise. A Brand is a distinctive identity, which differentiates a promise associated with a set of products and services, and indicates the source of the promise.

### **What Is The Promise Of The *Utah!* Brand?**

For active, destination-oriented individuals and families seeking rejuvenation and relaxation, Utah has world-class red rock and alpine beauty, diverse activities and adventures in an accessible and friendly Western atmosphere.

### **How Is The *Utah!* Brand Promise Communicated?**

The promise of the *Utah!* Brand is communicated by telling interesting stories about “a day in the life” ...

### **How Do These Stories Lead To Utah Visits?**

Telling these stories through our communications leads to Utah visits by reaching basic, innate emotional needs for discovery, recovery, relaxation, rejuvenation, and accessible recreation.

# The Relationship Between This Document And The Long-Range Strategic Plan

This document is meant to be a “living entity.” A user-friendly guide to the programs and branding efforts conducted by the Division that will continue to grow and evolve through time. By visiting the on-line version of this plan located at [travel.utah.gov](http://travel.utah.gov), you can stay current on the Division’s advertising and marketing plans, as well as the goals and operations of specific programs.

This plan relates to the Division’s Long-Range Strategic Plan by providing information of an immediate nature. This includes an ongoing situation analysis for Utah’s tourism industry, and information on the Division’s advertising strategy and current campaigns. The program overviews in this plan provide a link between the strategic plan and the specific tasks carried out by Division staff. These tasks are the most dynamic portion of the strategic plan. Change in program tasks reflects the Division’s accomplishments, as well as a commitment to considering current realities in the tourism industry.

# The Strategic Planning Tree

A few years ago the Division of Travel Development created an analogy to help explain the relationship between the long-term strategic vision and the specific tasks and actions taken by the Division's program managers in pursuit of these goals.

## **The Analogy Likened The Division of Travel Development To A Tree.**

As with any strong tree, our analogy must start at the roots or foundation of support. The roots of a tree spread far and wide to assure an adequate stream of nourishment to keep the tree alive and healthy. The *roots* of the Division of Travel Development represent an underlying assumption that an *adequate funding stream* will be available so Division programs can keep pace with development opportunities, and the rising costs of marketing communications. To accomplish this goal we seek innovative ways to fund our programs including performance-based, dedicated funding, public/private partnerships, and increased legislative support.

The trunk of the tree is the central support that helps ensure growth to the many branches that expand its reach. The Division's *trunk* focuses our *mission*, "to make Utah a better place to live by increasing the economic contribution of tourism."

From that single-minded idea grow the Division's four primary *branches*, or *Strategic Vision Statements* to accomplish our mission:

- *First*, develop and maintain a comprehensive communications plan.
- *Second*, assist in the development of high-quality infrastructure, destination-oriented products and attractions.
- *Third*, educate a critical audience on the value and benefits of destination tourism, the role and importance of hospitality, and the opportunities for intrastate travel and recreation.
- *Fourth*, base strategic decisions, program design and outcome measurement on research and quality data management.

From each of the four primary branches come a multitude of smaller branches, or *actions and programs*. Some of these include:

- Positioning the Utah! Brand (see above)

- Designing consumer communications programs that accentuate Utah's unique qualities
- Creating opportunities to maximize year-round visitation
- Supporting the development of destination products
- Advocating for responsible use of natural resources
- Educating tourism development partners and the general citizenry on the economic, social, and cultural benefits of destination tourism
- Supporting the efforts of local tourism entities who may desire to encourage intrastate travel and recreation
- Conducting research to provide a background for formulating program goals as well as a mechanism for measuring program effectiveness.



# Division of Travel Development Staff

## **Strategic Development**

### **Dean Reeder**

Director

538-1370

dean@utah.com

*Overall management and responsibility for the Division. Retained program functions include policy, strategy, and advertising*

### **Elaine Watts**

Administrative Assistant

538-1369

elaine@utah.com

*Personal secretary and assistant to the director*

### **Stacey Clark**

Planning Coordinator

538-1373

stacey@utah.com

*Assistant to the director for development, coordination, and updates of strategic plan*

### **Jon Kemp**

Research Coordinator

538-1317

jon@utah.com

*Economic impact analysis, accountability measurement, market research and tourism statistics for the Division*

### **Stan Nance**

Finance/Accounting

538-1374

*Financial and accounting procedures, records and operations*

### **Kathleen Truman**

Rural Technical Assistance

435-381-2030

ktruman@co.emery.ut.us

*Provides guidance and expertise to rural communities and initiatives*

## **Instate Development**

### **J. Spencer Kinard**

Assistant Director - Internal

538-1710

spence@utah.com

*Responsible for instate operations including media, publications, information services, distribution, and cooperative programs*

### **Margaret Godfrey**

Interagency Cooperative Programs

538-1479

margaret@utah.com

*Coordinator and manager of cooperative programs including SuperHost, Tourism Economic Development Conference, Scenic Byways, Welcome Centers, Travel Regions*

### **Kent Hansen**

Instate Communications

538-1377

kenthansen@utah.gov

*News releases, radio and television spokesperson, calendar of events, public relations*

### **Janice Carpenter**

Publications/Visual

538-1378

janice@utah.com

*Printing, contracts, slides, photos, and videos*

### **J. Scott Iverson**

Publications/Editorial

538-1324

*Coordinator for info on utah.com web site. Writer and editor for Utah Travel Guide, and other brochures and publications*

### **Sheri Bintz**

Executive Assistant / Information Services

538-1306

sheri@utah.com

*Assistant to assistant director for instate development; Information services and data operations supervisor*

## **National & International Development**

### **Gina Stucki**

Assistant Director – National & International Development

538-1318

gstucki@utah.com

*Responsible for international and national trade and media marketing*

### **Dwight Rimmasch**

Trade Development

538-1371

dwight@utah.com

*Trade development and coordination for North America, Asia, and northern Europe*

### **Ken Kraus**

Media Relations

538-1714

ken@utah.com

*Media coordination and materials for marketing efforts*

### **Diane Wilson**

Executive Assistant

538-1312

dianew@utah.com

*Assistant to assistant director for national and international marketing*

## **Staff**

### **Kathleen Mathie**

Receptionist

538-1900

mathie@utah.com

*Business-related information and call direction for telephone and walk-in clients*

### **Gerry Pond**

Call Center / Distribution Supervisor

538-1381

gpond@utah.gov

*Oversees operations of the call center; supervises the distribution function*

**Dave Hansford**

Distribution

*Warehouse inventories, deliveries, mail and supplies*

538-1381

**Florence Johnson**

Office Technician (Mail)

*Preparation of fulfillment materials for mailing and shipping*

538-1380

**Leela Beaudry**

Accounting

538-1374

**Dave Harvey**

Accounting

538-1374

**Dan Thomas**

Call Center

538-1759

**Margaret Reiser**

ZNHA Bookstore, Manager

538-1398

**Oliver Lewis**

ZNHA Bookstore

538-1398

**Erin Esplin**

ZNHA Bookstore

538-1398

## Section II



# Situation Analysis: Tourism In Utah



# Situation Analysis – Utah Tourism

## Overview

The lingering effects of 9/11, heightened geopolitical tensions, and uncertain economic conditions presented a challenging set of circumstances for the travel industry in 2002. Helping to mitigate the negative effects of uncertainty in the marketplace was a successful Olympic Games, which provided much needed growth during the first quarter and improved the state's visibility around the world. The domestic leisure travel segment provided the only source of growth in 2002, as both business travel and international travel suffered declines. Fortunately, the recent addition of Olympic facilities, resort expansions, hotels, and infrastructure improvements have increased the state's tourism capacity and improved its potential for competitive advantage.

## 2002 Summary

**Utah Bucks the National Trend.** Despite many challenges, Utah's travel and tourism sector performed admirably in 2002. Following two years of declines, non-resident tourism arrivals to Utah increased slightly in 2002 to 17.5 million. Domestic travelers accounted for all of the increase, as international visitation fell dramatically for the second straight year. Visitation reports indicated increases in vehicle traffic along Utah's interstates and more visitors at national parks and state operated welcome centers. Hotel occupancies increased to over 62% in 2002, marking the first increase in eight years. Despite falling prices nationally, statewide room rates held steady or increased, indicating strong demand and improved performance in the state's lodging sector. The downturn in air travel continued during 2002, with 2% fewer passengers at the Salt Lake International Airport compared to 2001. Drought-induced difficulties at many state parks prompted a 5% decline in state park visitation during the year. As expected, ski resorts reported a 9% decline in skier days as the Olympics, and the prospect of the Olympics, kept many skiers away.<sup>1</sup>

**Continued Uncertainty.** In 2002, consumers continued retrenching given increasing economic uncertainty related to employment, income growth, and the stock market. Reactions to the terrorist events of September 11<sup>th</sup> prompted further changes in travel behavior. Continued uncertainty with the economy, easily transmitted disease, and with global conflict has entrenched those changes in 2002. The most salient changes in travel behavior include:

- Shorter trips closer to home
- Less air travel and more drive traffic

---

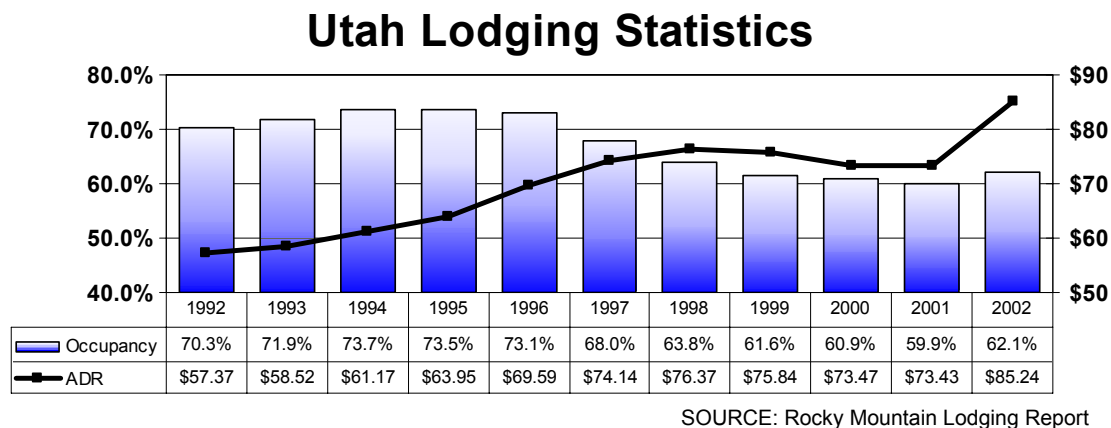
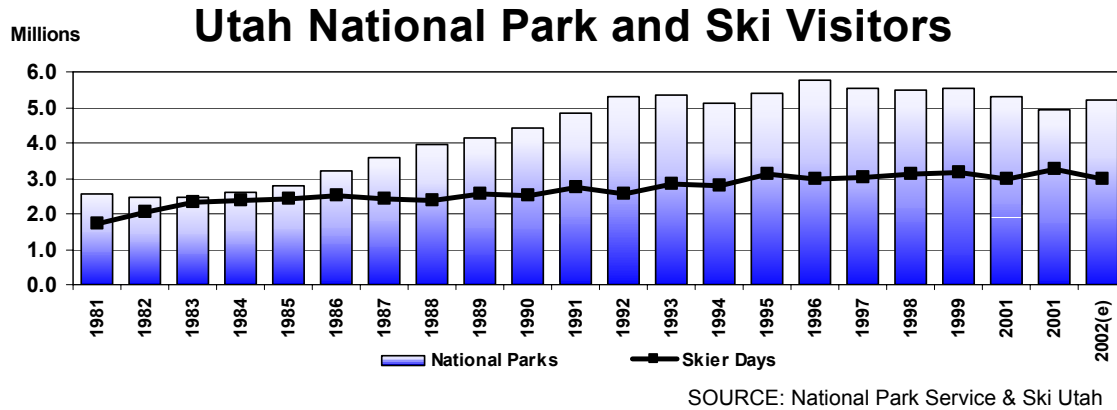
<sup>1</sup> Visitation reports collected from Salt Lake City Department of Airports, National Park Service, Utah Division of Travel Development, Utah Division of State Parks, Utah Department of Transportation, Ski Utah and the Rocky Mountain Lodging Report.

- Reduced spending
- More interest in making connections – with family, nature, heritage, and culture
- More interest in outdoor recreation activities and travel to rural America
- Shorter planning and booking horizons

**Spending Steady.** Utah has been well positioned to benefit from many of the changing travel patterns among domestic leisure visitors. Utah's gains among domestic leisure travelers, combined with the effects of the Olympics and a strong convention year, helped offset declines in business and international travel. Total traveler spending remained flat in 2002, at \$4.15 billion. Total state and local taxes generated by travel spending totaled \$332 million in 2002, or \$475 per Utah household. Strong gains in the hotel and restaurant sectors and increases from regional and discount airlines prompted travel-related employment to increase slightly in 2002. Total travel-related employment totaled 130,000 in 2002, accounting for nearly 12% of total Utah non-farm jobs.

<b>SUMMARY OF UTAH TOURISM ACTIVITY - 2002</b>			
<b>Economic Indicators</b>	<b>2002</b>	<b>2001</b>	<b>% Change</b>
<b>Total Non-Resident Visitors</b>	<b>17.5 Million</b>	<b>17.3 Million</b>	<b>+1.2%</b>
U.S. Visitors	17.0 Million	16.7 Million	+1.6%
International Visitors	540,000	600,000	-10.0%
<b>Total Tourism Spending</b>	<b>\$4.15 Billion</b>	<b>\$4.15 Billion</b>	<b>0.0%</b>
Total Tourism-Related Tax Revenues	<b>\$332 Million</b>	<b>\$332 Million</b>	<b>0.0%</b>
State Tax Revenues	\$246 Million	\$246 Million	0.0%
Local Tax Revenues	\$86 Million	\$86 Million	0.0%
<b>Total Tourism-Related Employment</b>	<b>130,000</b>	<b>128,500</b>	<b>+1.2%</b>
Direct Tourism Employment	72,800	72,000	+1.1%
Indirect Tourism Employment	57,200	56,500	+1.2%
<b>Volume Indicators</b>	<b>2002</b>	<b>2001</b>	<b>% Change</b>
Airline Passengers at Salt Lake Int'l. Airport	18.1 Million	18.4 Million	-1.6%
National Park Visitors	5.2 Million	4.9 Million	+5.2%
National Monument & Recreation Area Visitors (ex. GSENM & FGNRA)	3.5 Million	3.9 Million	-10.2%
State Park Visitors	5.8 Million	6.1 Million	-5.3%
Utah Welcome Center Visitors	677,000	660,000	+2.5%
Stateline Interstate Traffic Count	22.9 Million	21.7 Million	+5.7%
Total Skier Visits	3.0 Million	3.3 Million	-9.3%
Statewide Hotel Occupancy Rate	62.1%	59.9%	+2.2%
<b>Interest Indicators</b>	<b>2002</b>	<b>2001</b>	<b>% Change</b>
Utah.com Visitors	4.0 Million	2.7 Million	+48.1%
Total Phone Calls	39,800	46,500	-14.3%
Total Travel Guide Fulfillment	50,300	53,600	-6.1%

SOURCE: Utah Division of Travel Development, compiled from reporting agencies

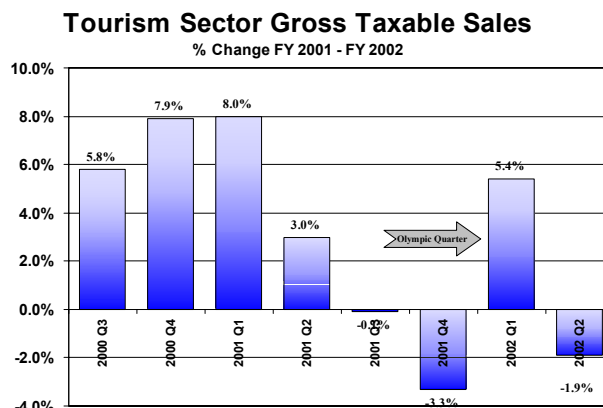


## The Impact of the 2002 Olympic Winter Games

**Marketing Success.** According to a recent IOC report, “the 2002 Olympic Winter Games are remembered today as a peaceful and safe gathering amidst turbulent times.”<sup>2</sup> Salt Lake hosted nearly 2,400 athletes from 77 countries through 16 days of competition. More than 220,000 visitors came from around the world to participate in the Olympic experience. Another 2.1 billion viewers from 160 countries consumed over 13 billion viewer hours. When news and other media coverage are considered, approximately 3 billion people were exposed to Utah, Salt Lake City, and the Olympic movement.

**Olympic Catalyst.** The Olympic Winter Games provided a much-needed stimulus to Utah’s tourism industry during the first quarter of 2002. Utah’s tourism sector, like the rest of the country, declined during the last half of 2001, contracting significantly in the last four months of

<sup>2</sup> Salt Lake 2002 Marketing Report, IOC, November 2002



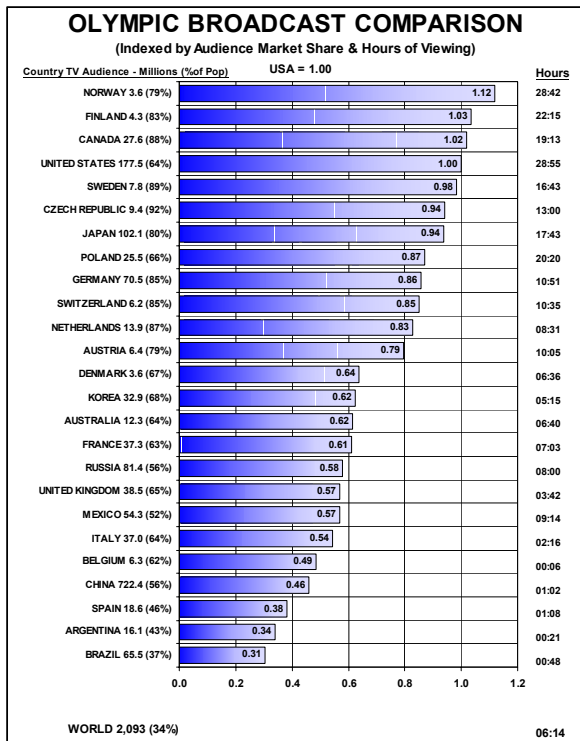


the year. During the third and fourth quarters, taxable sales in Utah's key tourism sectors declined 0.3% and 3.3%, respectively. However, during the first quarter of 2002, Utah tourism bucked the national trend by posting an Olympic-induced 5.4% gain. The significant increase helped prevent a decline in traveler spending and produced an increase in tourism-related jobs. Hotel and restaurant spending led the way, offsetting declines in transportation and auto rentals.<sup>3</sup> Statewide hotel occupancies, which had declined for six consecutive months prior to the Games, began increasing in the lead up to the Games and jumped nearly 19% in February. Even after the Games, statewide occupancies remained above 2001 levels.

ECONOMIC INDICATORS	2001 Q3	2001 Q4	2002 Q1	2002 Q2
Transportation	4%	-17%	-25%	-30%
Eating & Drinking	1%	-1%	6%	3%
Auto Rentals	-4%	-1%	-15%	-25%
Hotels & Lodging	-4%	-7%	31%	6%
Amusement & Recreation	1%	-6%	1%	3%
<b>TOTAL TOURISM SECTOR</b>	<b>0%</b>	<b>-3%</b>	<b>5%</b>	<b>-2%</b>
VOLUME INDICATORS	2001 Q3	2001 Q4	2002 Q1	2002 Q4
Airport Passengers	-9%	-8%	-6%	-5%
National Park Visitors	-7%	-9%	30%	12%
National Mon. & Rec. Area Visitors	-5%	0%	-6%	-12%
State Park Visitors	-7%	-8%	42%	-11%
Welcome Center Visitors	-15%	1%	11%	0%
Stateline Interstate Traffic	3%	5%	8%	6%
Statewide Hotel Occupancy Rate	-3%	-2%	4%	2%
Utah.com Website Visits	17%	8%	108%	58%

SOURCE: Utah Division of Travel Development,

The Olympic effect was not limited to the hotel sector. During the first few months of the year, visitation to national and state parks, state line vehicle traffic, and visitors to state operated welcome centers all increased. Partially offsetting these gains were anticipated declines in airport passengers and skier days.



SOURCE: International Olympic Committee

**Olympic Legacy.** Despite the significant gains for the state's tourism industry during the Olympic period, research indicates part of the Olympic legacy may be in increased tourism opportunities in the future. A survey among U.S. residents shortly after the conclusion of the Games identified changes in Utah's domestic image:<sup>4</sup>

- Utah's image improved slightly
- 7.1 million more adults say they are likely to vacation in Utah
- Utah is more recognized today for its scenic beauty, mountains, winter sports, ski resorts, cleanliness, and friendly people

<sup>3</sup> Utah State Tax Commission, tourism sectors include: Transportation, Eating & Drinking, Auto Rentals, Hotels & Lodging, Amusement & Recreation

<sup>4</sup> *Measuring the Impact of the Olympic Winter Games on Utah's Image*, Wirthlin Worldwide, Spring 2002

- Utah's high quality workforce is more recognized by executives around the country

Because of the depth of Games-time exposure, similar image and awareness improvements are expected in key markets in Western Europe, North America, and Asia. Despite the increased visibility of Utah among consumers, three major factors influence the effect of the Olympics on future travelers:

- Increased geopolitical tensions
- Continued economic uncertainty
- Ongoing memory decay (Utah's Olympic memory is expected to last only until the torch is lit for the 2004 Games).

**Improved Awareness.** The *2002 Post-Olympics European Study* explored the dynamics of consumer awareness and image regarding Utah in key international markets. According to the study, top-of-mind awareness for the state did not change between 1999 and 2002. However, when placed within the context of the Olympics, awareness of Salt Lake City and Utah increased significantly. In 1999, 1 in 5 Europeans could correctly identify Salt Lake City as the host of the 2002 Olympic Winter Games. By 2002, correct responses increased to 1 in 3. Awareness for the state also improved between 1999 and 2002, from 1 in 10 in 1999 to 1 in 6 in 2002. Among those consumers who were likely to travel to the American West (the "best customer" prospects), awareness gains were more pronounced, with 1 in 2 correctly identifying Salt Lake City and 1 in 3 mentioning Utah. The LDS Church was the most frequently named image of Utah in both 1999 and 2002, but aspects of Utah's geography, specifically mountains and desert, experienced large increases in the 2002 study.

**Immediate Benefits.** Utah has already enjoyed tremendous gains from the Games. In addition to the immediate economic impact of planning and hosting the Games, Utah citizens will benefit from the legacy of sport facilities, transportation infrastructure, additional hotel capacity, and resort improvements. Added benefits often overlooked are the intangible elements of civic pride, cultural development, and the impact of community outreach programs. In all, hundreds of thousands of Utah residents joined millions worldwide in experiencing the emotion and excitement of the Olympic Winter Games. Through increased tourism and business opportunities, the Olympics will continue to positively impact Utah's economy.<sup>5</sup>

## 2003 Outlook – Cautious Optimism

**Improvement on the Horizon.** There is an unusual amount of uncertainty regarding this year's outlook. Factors such as the economy, consumer confidence, the stock market, shifting travel preferences, and the war with Iraq all

---

<sup>5</sup> For more information on the economic impacts of planning and hosting the Games, consult *2002 Olympic Winter Games: Economic, Demographic & Fiscal Impacts*, GOPB, November 2001

cloud the outlook for 2003. Adding further uncertainty is the magnitude and timing of future visitation increases as a result of Olympic exposure. Nonetheless, Utah tourism is expected to increase in 2003. Olympic-induced awareness gains combined with product improvements, improving economic conditions, and regional population increases should stimulate growth in Utah's tourism industry during the next several years.

**Competition Intensifying.** Competition among nearby destinations for the local and regional markets will continue to intensify, as marketers re-focus their priorities towards close-to-home markets and quick getaways. With the notable exception of North America and the United Kingdom, foreign visitation will likely remain weak during the year as sluggish economies and unresolved geopolitical tensions continue to act as a deterrent to international travel.

**Long-Term Growth.** Capital investments in ski resorts, Olympic attractions, hotel construction, and infrastructure development bode well for the future. National trends highlight opportunities in key segments of the travel market including family travel, nature-based travel, and cultural and heritage tourism. Utah is well positioned to attract visitors seeking a higher quality, more unique experience. Continued investment in focused marketing and promotion efforts is essential to transforming the attention and image awareness generated by the Olympics into significant and sustainable economic gains.

## **Visitor Make-Up - Who They Are - How They Live**

Utah's most common visitor is a baby boomer family in the middle to upper class from the Western United States. The parents are generally well educated and employed. The purpose of their trip is leisure based, with the largest group visiting friends and family or enjoying a general vacation. Most visitors drive to Utah and stay in a hotel or motel. The summer is the most common time to travel to the state. Visitors typically include a variety of activities during their stay including:

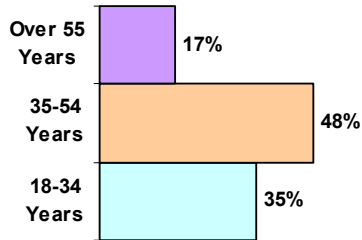
- Participating in outdoor recreation activities
- Exploring the national and state parks
- Touring Utah's vast open spaces
- Visiting historic and culture sites
- Going to specific attractions

As with most travelers nationwide, shopping, dining and entertainment are also important aspects of the trip to Utah. The average visitor to Utah stays over three nights in the state and spends \$75 per day. The following charts provide a summary profile of Utah's overnight leisure travelers.

## 2001 Utah Overnight Leisure Visitor Profile

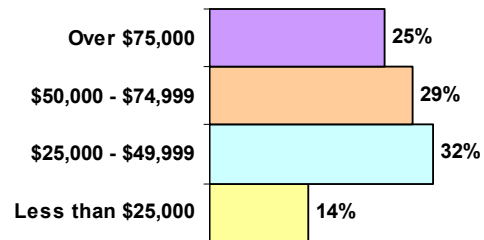
### Age

Avg. Age: 41.7 Years

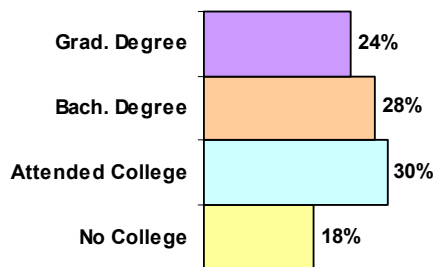


### Household Income

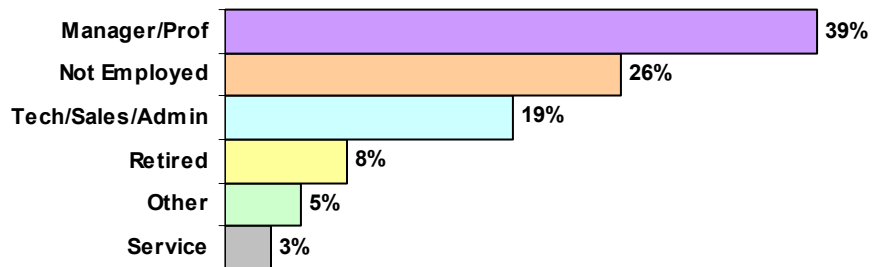
Avg. Household Income: \$57,600



### Education

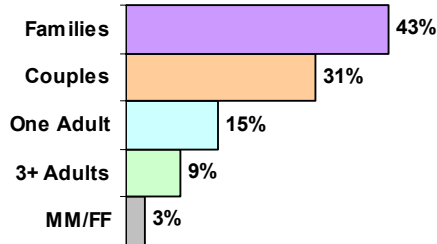


### Employment



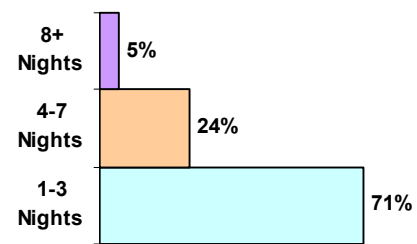
### Party Composition

Avg. Party Size: 3.4 Persons

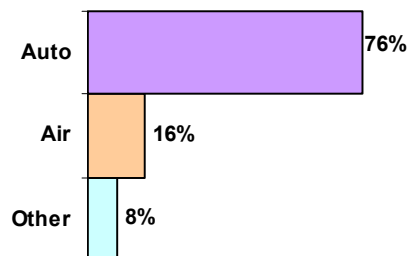


### Length of Stay

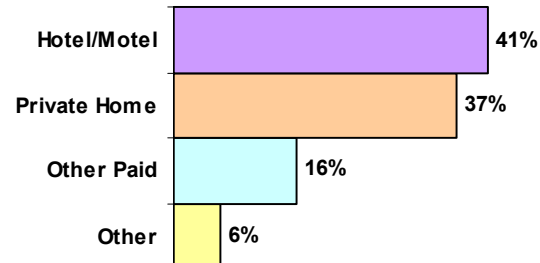
Avg. Length of Stay: 3.1 Nights



### Transportation

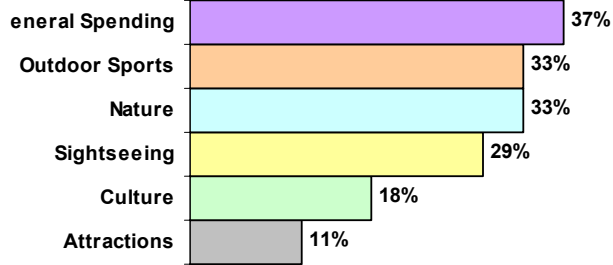


### Accommodations

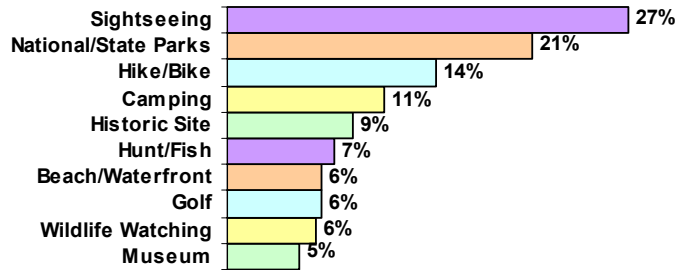


SOURCE: 2001 Utah Overnight Leisure Visitor Profile, D.K. Shifflet & Associates, Inc.

### Activity Clusters

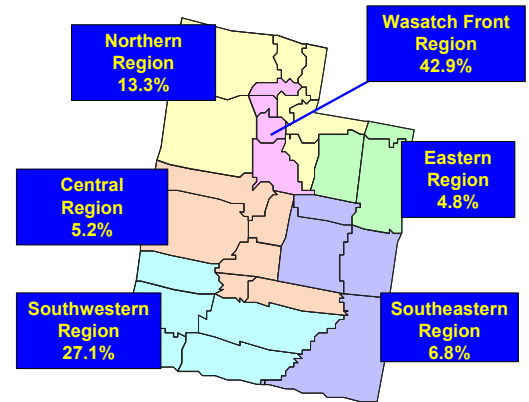


### Top Non-Spending Activities

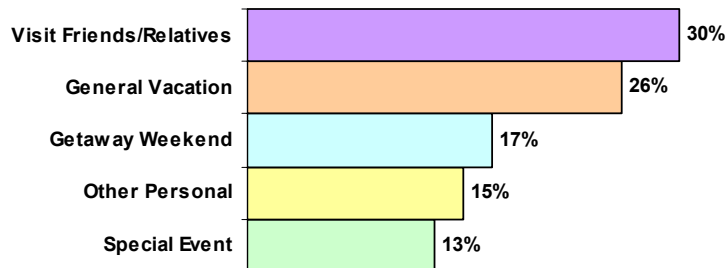


### 2001 Utah Overnight Leisure Regional Travel Distribution

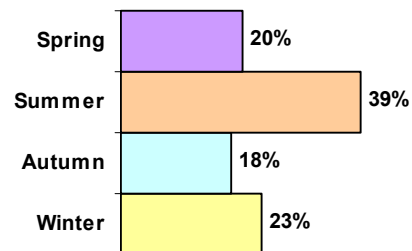
(Person-Trips)



### Purpose of Stay

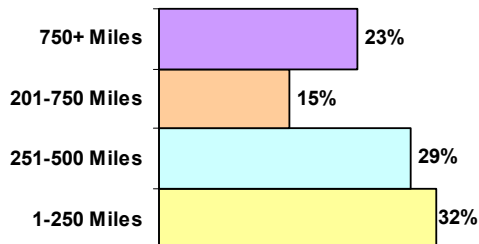


### Season of Travel



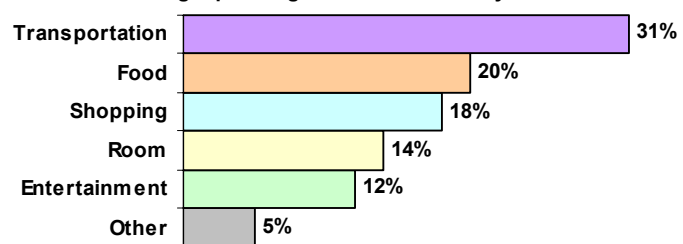
### Distance Traveled

Avg. Distance: 552 Miles



### Expenditures

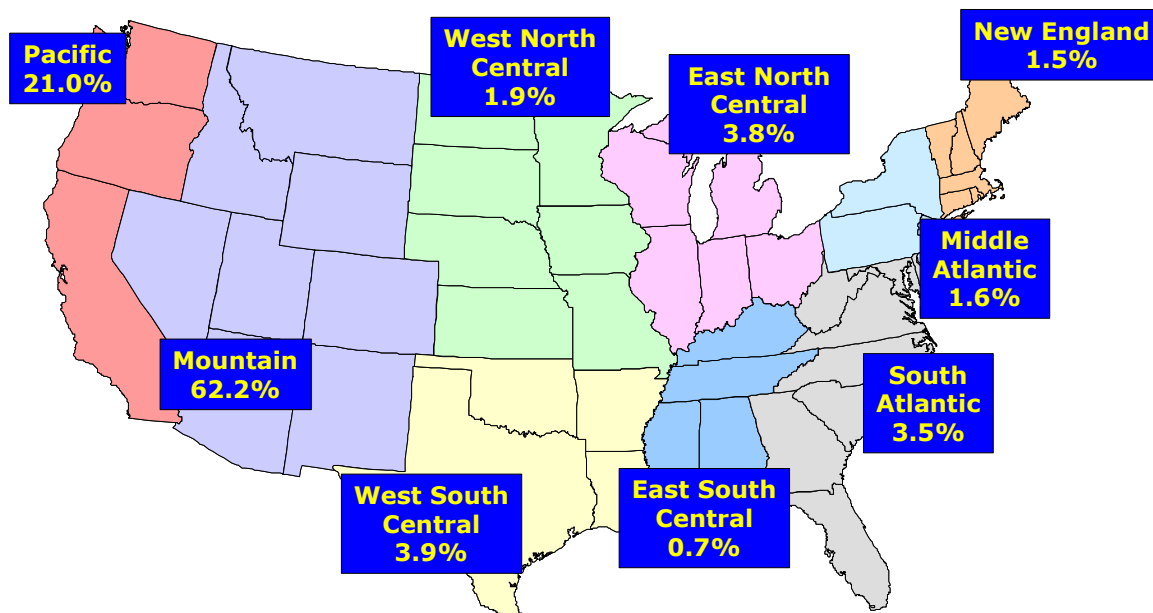
Avg. Spending Per Person Per Day: \$75



SOURCE: 2001 Utah Overnight Leisure Visitor Profile, D.K. Shifflet & Associates, Inc.

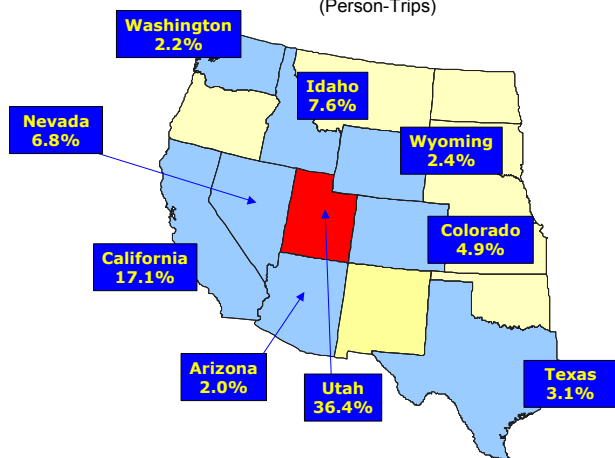
# 2001 Utah Overnight Leisure Origin Regions

(Person-Trips)



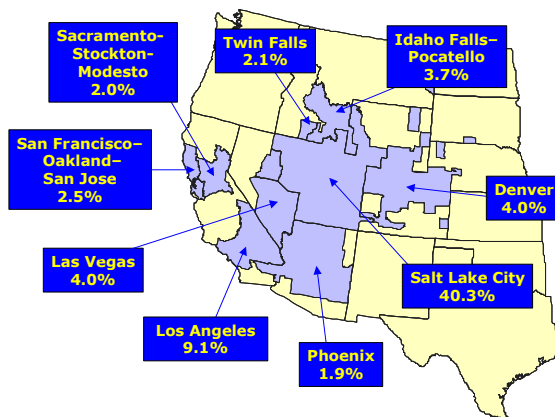
## 2001 Utah Overnight Leisure Origin States

(Person-Trips)



## 2001 Utah Overnight Leisure Origin DMAs

(Person-Trips)

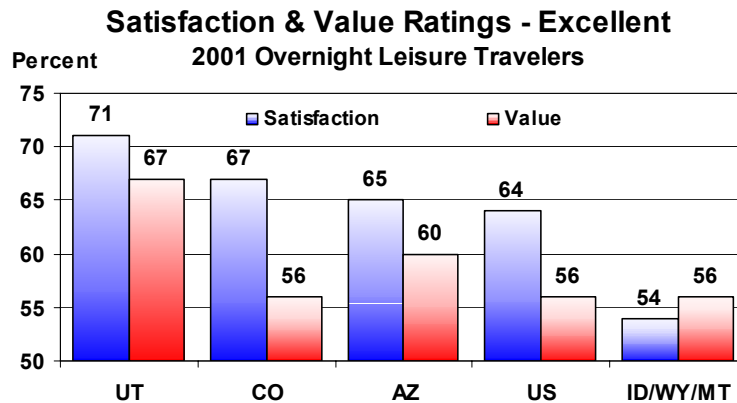


SOURCE: 2001 Utah Overnight Leisure Visitor Profile, D.K. Shifflet & Associates, Inc.

## Why Visitors Choose Utah

Utah's domestic visitor profile reveals several areas in which Utah has an advantage over other Western states. These strengths can be leveraged to promote additional tourism to the state. The most important strengths include:

- Utah maintains a value and satisfaction rating significantly above the U.S. average and above all its major competitors.



SOURCE: 2001 Overnight Leisure Profile, DKSA, Inc.

- Utah had the highest average number of persons (3.4) and the highest share of family travel (30%) on the trip relative to competitors.
- Utah has a strong percentage of marketable leisure travel due to relatively high shares of general vacation (26%) and getaway weekend travel (17%). Utah continues to grow the general vacation segment, reporting a strong 36% new-visitation rate during 2001. Utah posted the largest increase in the "general vacation" travel category relative to its competitors.
- Despite the negative impacts of 9/11 and a lackluster economy on long distance travel Utah gained share of air travel (16%) and increased its share of long distance visitation among travelers originating more than 750 miles away (23%).
- Despite the trend towards shorter vacations, average overnight leisure visitors stayed 7% longer in Utah, increasing the average length of stay to 3.1 nights.
- Utah continues to outperform its competitors in the nature and outdoor recreation activity clusters, with participation levels in these two segments higher than in neighboring states.

Utah's travel profile also indicated some weaknesses relative to its competitors:

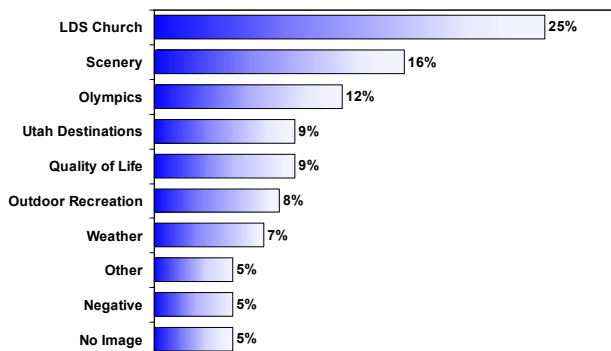
- Overnight leisure visitors consistently spend less in Utah than in competing states. Reduced spending is likely the result of lower participation in spending activities such as shopping, dining, and entertainment relative to its competitors. In addition, although Utah increased its share of high-income visitors, the state still trails both Colorado and Arizona in attracting these groups.

Utah's most significant challenge lies in increasing awareness of the state's tourism product and differentiating its product from that of other states and destinations. Recent surveys of the general public in the U.S. discovered that Utah has a largely undefined image. By contrast, both Colorado and Arizona have more developed images that translate into a more positive "feel" for those states, and consequently, a greater desire to visit those destinations.

### Top Images Associated with Utah

March 2002

*What is the first thing that comes to mind when you think about Utah?*

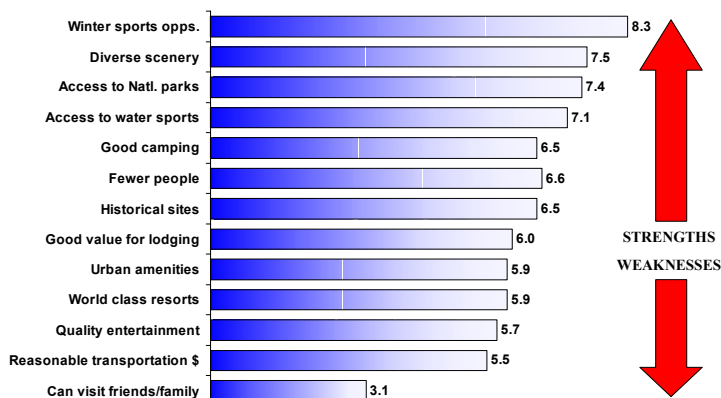


SOURCE: Wirthlin Worldwide

Not surprisingly, Utah's most defined image was the LDS Church (Mormons). Utah's scenery, especially the mountains, the Olympics, and specific destinations were also popular responses. A smaller percentage of respondents indicated an emotional image of the state, tied in with the people or the quality of life the state offered. However, the image of the state was largely superficial, with few respondents able to provide either a strongly positive or strongly negative image of the state. A lack of familiarity was also the strongest negative reaction to Utah's image, accounting for nearly 40% of all the negative responses. The Olympics reinforced many of the positive attributes people already associated with the state and helped educate many who had no previous image of the state. Nearly four out of ten people reported learning specific, new, positive things about Utah as a result of the Olympic exposure.

### How Utah's Image fits Selected Travel Attributes (10-point scale)

*Just based on what you currently know about the state, please tell me how well you think each phrase describes Utah.*



SOURCE: Wirthlin Worldwide

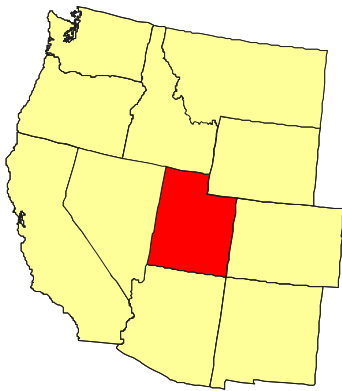
Consumers identified several characteristics about traveling in Utah that reflect comparative advantages for the state's tourism product. Winter sports, national parks, diverse scenery, and water sports (fishing, rafting, boating) are at the top of the list. Many consumers also favored Utah's camping



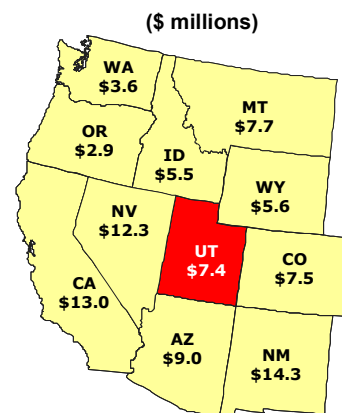
opportunities, open space, and historical sites. Several attributes were seen as neutral, indicating neither a competitive advantage nor a disadvantage. Neutral attributes included perceived value of lodging and transportation, urban amenities, quality entertainment, and world-class resorts. The only attribute that Utah scored below the national average was in attracting friends and family, which was not surprising given Utah's relatively small population.

Tourism is an integral component of the regional economy. Nevada and Wyoming are the states most dependent on tourism in the region. However, all of the states in the Western region have sizeable tourism industries that significantly impact the economies of their respective states. Further, with the notable exception of Nevada, most of the region's tourism is similar, especially among the Mountain states. Visiting National Parks and touring comprise the primary activities of visitors in each of the Mountain states. Outdoor recreation also attracts large numbers of visitors to the region. Denver and Phoenix are the region's primary business hubs, although most of the region's leisure travel revolves around Las Vegas. For the majority of Mountain states, inter-regional travel represents their primary markets. In addition, most of the states actively compete for leisure travelers in the California and Texas markets.

### Total Traveler Spending



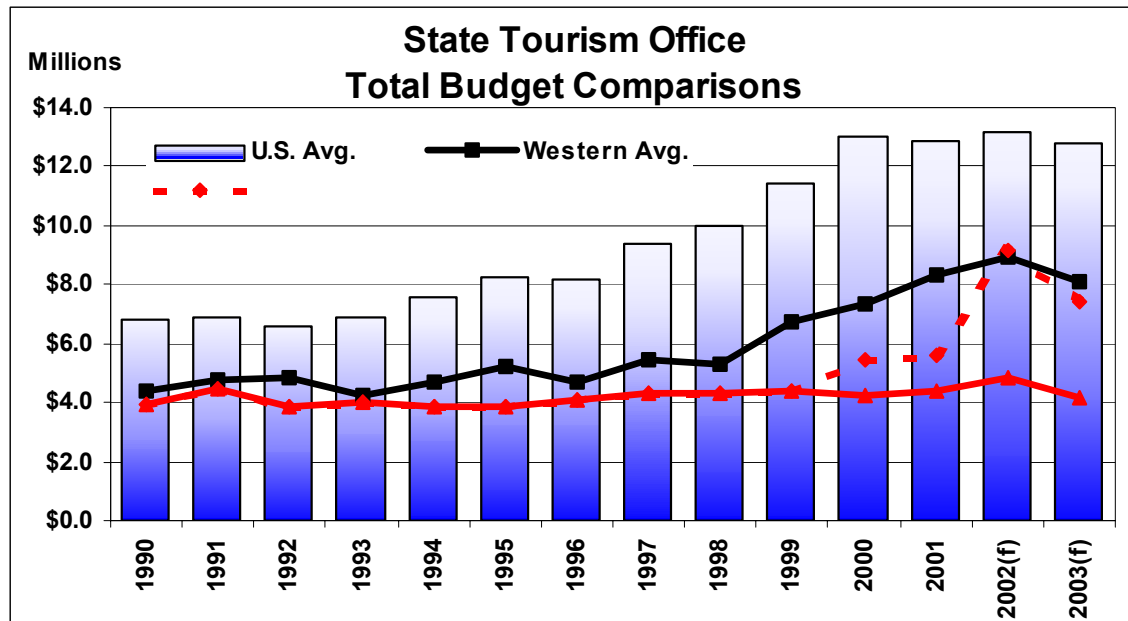
### Total State Tourism Office Budget FY 2003 (projected)



SOURCE: TIA, *Survey of U.S. State Tourism Offices*, 2002

Historically, the state tourism offices of most of Utah's neighbors have operated with larger budgets. The average Western state tourism office budget for FY 2003 is \$8.1 million, compared to the national average of \$12.8 million. During FY 2003, Utah's projected state tourism office budget ranks seventh of the eleven Western states. However, Utah's ranking is somewhat misleading because of \$3.2 million in one-time funding. Utah's base state tourism office budget is \$4.2 million, ranking the state ninth of the eleven Western states. Despite a series of recent one-time legislative appropriations that have closed the gap between Utah and other Western states, Utah's base state tourism office

budget remains half the Western state average and one third of the national average.



SOURCE: TIA, *Survey of U.S. State Tourism Offices*, 2002

## Travel and Consumer Trends

**Empowerment and Connections.** The changes in the consumer psyche – fueled by the economic prosperity of last decade – have not retreated despite a still-faltering economy. Consumers now expect options, discounts, and control. Events of the past year have caused consumers to reevaluate their lives and realign their choices to reflect what matters most. Authenticity and substance are paramount. To be effective, marketers must present a message that emotionally resonates with consumers. So the key question is, what matters most?

- 1. Family comes first.** A trend underway for much of the past several years, the move to reconnect with family and build stronger relationships was accelerated after September 11<sup>th</sup>.

### **IMPLICATIONS**

- More travel to visit friends and relatives
- More travel to family-friendly destinations such as national parks, theme parks, historic sites, beaches, and mountains
- More road trips and less flying
- More “hot deals” and competitive pricing
- More single-parent and multi-generation family vacations
- Destinations must offer a variety of activities

- 2. True leisure restored.** After several years of increasing demands on time and availability, expect today's travelers to place a higher value on relaxation and rejuvenation.

**IMPLICATIONS**

- More attention to service levels and choices of amenities
- Travelers will increasingly look to reconnect with nature, culture, and history
- More short trips and weekend getaways to close-to-home destinations
- Increase in off-season travel
- Adventure travel will continue to thrive
- Spa resorts and cruise ships are likely to become more popular
- RVs will increase in popularity

- 3. Service. Service. Service.** Knowledgeable service is increasingly valuable. Given increasing price parity among product options, service becomes the differentiator.

**IMPLICATIONS**

- A consumer-driven movement towards customization, especially in bundling of services and flexibility of itineraries
- Greater attention on niche markets
- Increased use of Internet for travel planning and booking
- Greater price competition means value added services will be key
- More attention on convenience of travel experience

- 4. Truth in advertising.** There is evidence of growing skepticism regarding information sources. Hype, glitz, and false claims engender mistrust of many mediums. Consumers want "real."

**IMPLICATIONS**

- Niche markets such as eco-tourism, heritage tourism, and geo-tourism become more mainstream
- Increased interest in destination uniqueness: local foods, distinctive lodging, specialty shopping, special events, cultural attractions
- More reliance on personal experience and recommendations of friends and relatives

- 5. Balance.** The disconnect between the lifestyle consumers say they want and the reality they live has spurred a movement toward greater introspection and life changes.

**IMPLICATIONS**

- Mature market will begin to grow rapidly as baby boomers reshape their professional and leisure pursuits

- Younger generations view travel as a birthright and will look to leisure time to provide their families with truly relevant experiences
- Demographics will drive destination growth strategies: focus on aging travelers, minority travelers, and women
- Greater emphasis on personal spirituality including history, culture and heritage
- More attention on experiences that offer a combination of physical and spiritual renewal

## Section III



# Program Overviews



# Travel Trade Development And Public Relations

*Revised April, 2003*

## **Situation Analysis**

Coverage of the 2002 Games put Salt Lake City, Utah on the *global map*. The IOC reports that the Salt Lake 2002 broadcast was the most successful in Olympic Winter Games history – 2.1 billion viewers in 160 countries watched the Winter Olympics. Levels of television viewing were particularly high in the U.S., Canada, Germany and the Scandinavian countries. Extended news and feature coverage related to the Games meant a total of nearly 3 billion people around the world were exposed to media coverage of the 2002 Olympic Winter Games.

The Division needs to convert that higher global awareness into increased visitation to Utah in the years to come and position Salt Lake City as the gateway to exciting and varied destinations throughout the state.

Long-haul travel to the United States was down in 2002, after dropping dramatically in the wake of the September 11 terrorist attacks. Economic weakness in Europe and Japan also hindered visitation to the U.S. Forecasts in the fall of 2002 suggest long-haul travel will recover to 2000 levels by 2005-2006. However, war with Iraq, continuing economic slowdowns, SARS, terrorist attacks around the globe, and geo-political tensions will negatively impact those forecasts.

## **Target North America**

In the post-Olympic period, the *largest and most immediate* potential for visitation to Utah comes from the United States -- particularly from the western half of the country. A Wirthlin Worldwide spring 2002 national survey indicated that more than seven million American adults are more likely to vacation in Utah as a result of watching the Winter Olympics. Other factors also contribute to potentially higher visitation from the U.S.:

- Many Americans are avoiding overseas travel – taking shorter, less-expensive trips closer to home;
- They're doing more driving and less flying;
- They're taking more last-minute getaways;
- They're enjoying America on Sale – taking advantage of special tourism deals available throughout the nation and here in Utah;
- They're rediscovering adventure in America's national parks and other public lands and creating family memories in safer destinations closer to home.

These trends and the Olympic boost benefited domestic leisure travel in Utah during 2002. In contrast, Hawaii, Florida and other states more dependent upon overseas visitors and those who arrive by air, had a difficult year for tourism.

**North America is thus our top travel development market in FY 2003.**

Canadians, like Americans, enthusiastically watched the Salt Lake Olympic Games. Canada is already the top international market to Utah and its stronger economy bodes well for future travel growth. Forecasts also indicate a faster rebound in travel from Canada and Mexico – reaching 2000 levels sometime in 2003.

### **International Markets**

After conducting an extensive post-Olympic analysis to prioritize our travel trade and allied public relations markets, we identified three target tiers. Throughout the year, changing conditions in the tourism industry and in each of the countries may require adjustment in those tiers and/or in the strength and timing of programs in each nation.

- Joining the United States in the top tier for FY 2003 are Canada, Mexico, the UK, Germany and Japan.
- Budget permitting, France, Italy, Belgium and the Netherlands comprise the second tier; while
- Scandinavia represents an Olympic Follow-up Market with promising potential for travel development.

More intensive programs will take place in the top tier markets. Spot projects will be emphasized in second tier markets and in Olympic Follow-up markets, depending upon budget modifications due to state revenue shortfalls. Trade development efforts will focus on key industry leaders in the wake of recent/current travel industry consolidation, particularly in Europe. We will continue to closely monitor developments around the globe to fine-tune our travel development plan. *Because of its major disruption to long-haul travel, war with Iraq and other external factors will intensify our focus on North America.*

### **Features of the FY 2003 Plan**

- **Timing is a crucial factor.** The emphasis on the United States, Canada and Mexico intensifies during 2002/2003. We will simultaneously lay the groundwork for our overseas plan and increase the intensity of that program as sentiment and situations improve for long-haul travel to the United States.
- **The Travel Development and allied Public Relations plan is designed to be flexible.** It can take advantage of shifts in public perceptions about

travel. It can react to changing economic conditions. And it can be adjusted quickly to target new opportunities or to change direction in particular markets when warranted.

- **Budgetary considerations mandate that we leverage resources with tourism, business development and other partners** when and where our respective goals intersect. The Travel Division will work with the Division of Business Development's (DBED) in-market representatives in select overseas countries and partner with a variety of Destination Marketing Organizations (DMO) from around the state and region for specific travel development projects.
- **The Division will develop new post-Olympic e-marketing and tourism collateral for use in target markets as part of the 1,000 Day Plan.**
- **The Division's plan is designed to work in conjunction with the Governor's 1,000-Day Plan.** The Division will participate in select trade missions on the Governor's itinerary to maximize synergies with business development strategy.

## **TOP TIER MARKETS**

### **North American Plan**

#### **United States**

Three-quarters of the U.S. population watched the broadcast of the 2002 Salt Lake Games. A post-Olympic survey by Wirthlin Worldwide shows that Utah is now more recognized for its scenic beauty, winter sports, ski resorts, cleanliness and friendly people.

That increase in imagery awareness coincides with a patriotic surge in the U.S. Americans will See America in 2002/2003. They'll rediscover adventure in America's national parks and other public lands. They'll create family memories in safe destinations closer to home. And they'll take advantage of special tourism deals available throughout the nation and here in Utah.

The Division's advertising program targets western states -- strong markets for travel to Utah. In FY 2003, the Division will use public relations and trade development to complement that advertising.

- Generate media coverage of Utah destinations in key western metropolitan centers: Los Angeles, San Francisco, San Diego, Portland, Seattle, Las Vegas, Phoenix, Denver, Dallas and Houston.



- Further develop media relationships established before and during the 2002 Olympic Winter Games with major national magazines and East Coast publications to ensure continuing coverage of Utah destinations.
- Collaborate with tourism partners – Ski Utah, the SLCVB and others -- on individual and group media familiarization tours to Utah destinations to enhance coverage and leverage resources.
- Develop attractive and effective e-mail outreach to travel media, directing them to our online newsroom at <http://travel.utah.gov>
- Expand the range of image and information resources on our online newsroom at <http://travel.utah.gov>
- Facilitate media coverage in Canada and Mexico, particularly in conjunction with trade shows, trade missions and sales calls.
- Investigate and pursue, budget permitting, innovative broadcast public relations projects that showcase Utah recreation and destinations to out-of-state audiences.
- Create a Trade Show Toolkit that tourism partners can use to include the Utah! Brand and imagery in their booth/display at various trade and consumer shows.
- In collaboration with tourism partners, attend and/or provide Utah collateral at major travel trade shows in North America.
- Participate in select components of Governor Leavitt's post-Olympic trade missions.
- Investigate opportunities to promote expanded VFR (visiting friends and relatives) travel during the post-Olympic period. Post 9/11, there is growing interest and participation in family reunions, weddings and other familial travel spanning generations.
- Investigate opportunities to promote post-Olympic corporate incentive travel in FY 2004 in anticipation of eventual economic recovery. High achievers in the corporate arena are a good match with the Olympic cachet Utah now enjoys and the varied adventure available here. Those high achievers can be influential in spreading the word about Utah when they return to work, in essence becoming ambassadors for the state.

## **Canada**

Ninety-five percent of the Canadian population watched the Salt Lake Olympic Games on television. Canada already constitutes the top international market to Utah and, historically, has provided strong visitation to the American Southwest.

- Target Vancouver and Calgary/Edmonton in western Canada (direct flights to SLC) and approach eastern Canada through the direct flight market to Las Vegas.
- Represent Utah at select Addison travel trade shows in Vancouver, Edmonton and Calgary.
- Investigate the potential for working with tour operators and receptives in Quebec to reach French-speaking Canadians and inbound French travelers to North America (including the niche mountain biking market to Moab from Quebec).
- Use Vocus-based public relations outreach to target Canadian journalists we've worked with in the past, U.S.- based correspondents for Canadian media and major Canadian media outlets.

## **Mexico**

Half of Mexico's population watched coverage of the 2002 Olympic Winter Games. That unexpectedly strong exposure for Utah mountain resorts, combined with direct flights to Salt Lake City on AeroMexico, make upper-income/wealthy residents of Mexico City a promising market. Skiers from Mexico have traditionally been the second-largest international market at Vail, Colorado and now, due to Olympic exposure, can be tempted to ski Utah instead.

- The Division will collaborate with tourism partners in the Mexico Marketing Coalition to promote Utah winter product to the travel trade and to upper-income consumers in Mexico City and other major metropolitan markets.
- The Division will contract with DBED's Mexico representative, Guadalupe M. de Escalante, for spot projects in key urban markets.
- Media outreach will target key publications and focus on reporters familiar with Utah mountain resorts.
- Marketing communications and trade development will include promotion of year-round activities at destinations throughout Utah.

## **Overseas Plan**

Budgetary considerations mandate that the Division work with DBED's in-market representatives in select overseas countries and partner with a variety of Destination Marketing Organizations from around the state and region for specific travel development projects where and when our respective goals intersect. We will also participate in select overseas components of the Governor's post-Olympic trade missions.

### **United Kingdom**

In 2001, the UK replaced Japan as the #1 market for overseas arrivals to the United States. Tourism from the UK was less affected by the 9/11 terror attacks and the British economy has remained relatively healthy during the recent global economic slowdown. Las Vegas is a major gateway city for travelers from the UK, providing growth potential for nearby southern Utah.

The UK also represents the largest source of overseas skiers to Utah. The Division will continue to partner with Ski Utah, the SLCVB, Deer Valley, Park City Mountain Resort, Snowbird and international partners in the UK market.

- The Division has contracted with Communications in Business (CIB) for in-country travel trade representation and media outreach in the UK market.
- The Division will participate at World Travel Market in London Nov. 11-14.
- The Division's public relations outreach targets UK journalists we've worked with before and during the 2002 Winter Games, U.S.- based correspondents for UK media and major UK media outlets.

### **German-Speaking Countries**

While a sluggish economy and 9/11 have reduced travel to the U.S. from Germany, German-speaking nations remain major long-term markets for visitation to Utah. Germany and Austria were powerhouse competitors at the 2002 Olympic Winter Games and Germans watched more Games coverage than anyone else in Europe. Germans and Swiss are also drawn to the red rock country of southern Utah and have traditionally been an important source of visitation to the state's national parks.

- The Division will continue to collaborate with tourism partners on a spot-project basis in the German market.

- Major group and FIT tour operators have Utah product in their catalogues, but say they need help from DMOs to persuade German-speaking consumers to travel, particularly in the post 9/11 environment. The Division will partner with the SLCVB, Moab Area Travel Council, St. George Convention and Visitors Bureau and three neighboring states in a series of consumer shows throughout Germany.
- The Division has contracted with Get It Across Marketing (Albert Jennings) for in-country travel trade representation.
- Participate at ITB in Berlin, March 7-11.
- Public relations outreach targets German-speaking journalists we've worked with before and during the 2002 Olympic Winter Games and U.S.-based correspondents for major German, Swiss and Austrian media outlets.

## **Japan**

Tourism from Japan to the United States dropped dramatically after the 9/11 attacks. Fourth quarter visitation in 2001 was down by 55%. Outbound travel from Japan to the United States is projected to begin recovering in 2003 and return to 2000 levels by 2005-2006.

Ninety-five percent of the Japanese television audience watched more than 18 hours of Olympic Winter Games coverage, despite a difficult time difference and poor team performances. There is post-Olympic interest in Salt Lake City and the Grand Circle.

Las Vegas is a major gateway city for the Japanese market and close to the national parks of southern Utah. Japanese tourists are increasingly looking for safe, close-to-nature destinations. So Utah is well positioned to benefit from the eventual recovery in inbound tourism from Japan.

The top seven Japanese tour wholesalers will promote nature tours to Utah's national parks in a campaign to boost visitation to the U.S. mainland in 2003.

Tour operators in Japan are focusing their North American product largely on Utah, Arizona, and Wyoming.

- In late 2002, the Division conducted a mandatory review of Japanese market representation. As a result of the RFP, the Division contracted with Fieldstar International (Osamu Hoshino), continuing a tri-state approach to Japan (partnering with Arizona and Wyoming) that allowed Utah -- before, during and after the Olympics -- to leverage Division resources for in-market representation.

- Budget constraints require a reduced level of in-market representation in Japan, compared to years past. But we believe that it's important to retain a presence in this strongly relationship-based market for eventual recovery of U.S. tourism from Japan.
- Conduct PR outreach through in-market representative, with direction/support from the Division.
- Represent Utah at select travel trade shows and trade missions in Japan and in the U.S.

## **SECOND TIER MARKETS**

Travelers from France, Belgium, the Netherlands and Italy predominantly come to Utah to experience our national parks and red rock landscapes. All of these second tier markets were significant competitors during the 2002 Olympic Winter Games and generated extensive media coverage of Salt Lake City. That coverage also focused prominently on southern Utah, the primary draw for visitors from these nations.

The Division will look for opportunities to collaborate with DBED's International Trade Development Office to leverage resources in these second-tier markets. Spot projects would include participation in select components of the Governor's Trade Missions and potential sales calls to major tourism contacts.

## **OLYMPIC FOLLOW-UP MARKETS**

Scandinavian countries are strong on winter sports and were powerful competitors during the 2002 Olympic Winter Games. As such, their residents saw extensive coverage of Salt Lake City, Utah. Scandinavians watched more Winter Olympic coverage than any other part of the globe.

### **Scandinavia**

Scandinavians are tech-savvy, with one of the highest Internet usage rates in the world – providing strong potential for e-marketing of Utah tourism. They also receive generous amounts of vacation time and the Olympic-induced awareness of Salt Lake City could be used to generate interest in visiting other parts of the state that offer recreation and landscapes they cannot find at home or elsewhere in Europe.

The Scandinavian market has a smaller population than France, Italy or the UK. But Scandinavia boasts a relatively large percentage of U.S. travelers who make repeat visits to this country. That repeat visitation market could bode well for Utah in the post-Olympic period.

- The Division will utilize Gold Key service to open tourism-related doors in those Scandinavian countries that had strong participation in the Winter Olympics and that indicate interest in travel to Utah.
- We will focus initial activities on Sweden and Copenhagen -- the gateway to international travel from Scandinavia and headquarters for the airline SAS. We will also investigate opportunities to partner with other tourism entities in Utah on spot projects in Scandinavian countries.

# **IN-STATE PROGRAMS**

## **ADMINISTRATION**

### **Overview**

One of two assistant directors has management and supervisory responsibilities for the in-state programs. There is a program assistant to help coordinate the programs and provide secretarial support, and who functions also as an information technologies coordinator for the Division.

## **PUBLICATIONS**

### **Overview**

The primary purpose of state travel publications is to provide written material, in either printed or electronic form, about Utah's tourism attractions, locations and access for use as either a guide or a marketing tool. Principle publications are: [utah.com](http://utah.com) (Internet), [travel/Utah.gov](http://travel/Utah.gov) (Internet), Travel Guide (bi-annual), Accommodations Guide (annual), Scenic Calendar (annual), brochures (as needed), CDs (as needed), and maps (as needed). Two full time staff are assigned to this program – a manager/editor, and a photo editor/printing coordinator.

### **Goals**

The Internet continues to be a growing and important function of tourism development and information delivery. [utah.com](http://utah.com), a private, commercial enterprise in partnership with the Division, provides excellent service for tourism information about Utah.

Demand for the Utah Travel Guide continues to decline as more people are getting the information they need via the Internet. As a result, a printing of 400,000 copies now lasts more than two years, but because we have changed to printing undated editions, all printed copies are used before new ones are printed. Cutting the print run (fewer copies) or extending the use to three years might allow us to reduce costs more.

The Utah Accommodations Guide has been printed in partnership with the Utah Hotel & Lodging Association for the past four years. UH&LA is interested in pursuing an independent publication. It may be that a UH&LA publication, like the Ski Utah Vacation Planner, will fill the public need and we can shift to an electronic accommodations list only via the Internet.

## **INFORMATION SERVICES**

### **Overview**

This program provides information and assistance to the public on an as-requested basis. It includes a call center, mail fulfillment and distribution, e-mail response, walk-in information service and materials storage (warehouse). The

staff includes a call center/distribution supervisor, two call center operators, an office technician for fulfillment, a gift shop manager and a receptionist.

### **Goals**

Most states provide only an automated voice response, which gives basic information and records names and addresses for fulfillment. Our choice for higher, personal customer service through the use of live, knowledgeable information operators remains manageable because of relatively low level of calls (500-600 week)

The greatest potential need for additional information service would come in increased e-mail requests via the Internet sites. All of our current advertising lists only the web address as a call-to-action.

## **IN-STATE COMMUNICATIONS**

### **Overview**

Similar to information services in direction, only the primary target of the information is Utah mass media. The one-person program provides public relations and information to news media to keep them informed about Division issues and general tourism information and includes a weekly radio report to Utah stations. A weekly and annual activities events calendar also is produced and distributed through this program.

### **Goals**

Expanding the number of radio stations carrying the weekly report will continue to spread the word about travel in Utah to Utahns, but to more accurately meet our mission, we are seeking to get radio reports on stations in neighboring states. We are also looking for opportunities for independent radio shows on tourism. The events calendar data gathering consumes a lot of time. We continue to seek additional electronic tools to help us collate the information without having to enter it ourselves.

## **INTERAGENCY COORDINATION**

### **Overview**

One full time employee coordinates Travel Development programs with other state, federal, county or quasi-governmental agencies. Included in this program are gateway welcome center operations, Scenic Byways, county and region travel offices, cultural & heritage tourism councils and special programs, including conferences and seminars. In conjunction with the Federal government, there are new opportunities with the Departments of Commerce, Transportation, and the Interior



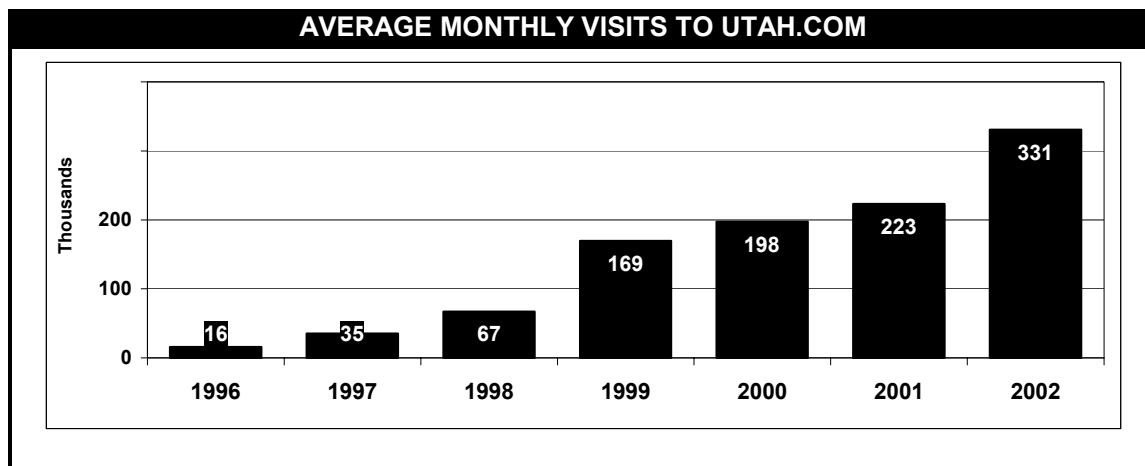
# The Internet And Utah

The Division of Travel Development maintains an Internet presence primarily through two sites, [travel.utah.gov](http://travel.utah.gov), and [utah.com](http://utah.com). The Division links to and participates in sites sponsored by other departments and divisions of Utah state government through both of these sites.

The content made available through [travel.utah.gov](http://travel.utah.gov) is designed to provide details and information useful to members of Utah's tourism industry, national and international media, and individuals interested in the tourism industry in Utah. This site contains details of specific Division programs, research relating to tourism in Utah, and news releases on developments in Utah's tourism industry.

Considered a commercial site, [utah.com](http://utah.com) is geared to meet the needs of individuals who are planning travel throughout the state of Utah. The site is the primary "call to action" or source of additional information in the Division's advertising of the state. (see below)

The Internet has rapidly become the premier tool for travel planning. More and more, consumers are turning to online sources to build and customize itineraries for their trips. This includes looking for deals, deciding which activities and events to pursue, and downloading maps and other transportation details. Utah has experienced a dramatic rise in the popularity of its consumer website, [utah.com](http://utah.com). Visits to the website have increased dramatically each year since the site's inception in 1996, averaging over 330,000 visits per month during 2002.



The paradigm for accessing and processing travel information is changing rapidly. Fewer travelers rely on 1-800 numbers and mail requests as more make use of the variety of destination websites, travel portals, industry specific websites and search engines. As a result of the unique public/private partnership between the Division of Travel Development and Utah.com, LC, travel planners

have access to information that is quick, convenient and accurate, thus improving the service relationship between the *Utah!* Brand and the consumer.

## **Utah.com**

The Internet continues to be an integral part of the *Utah!* Brand's marketing mix and look. Typically, [utah.com](http://utah.com) is positioned as the dominant contact source in all of the Division's advertising. The site interacts with travelers by providing a comprehensive look at Utah while allowing visitors to plan their vacation here. [Utah.com](http://Utah.com) is an increasingly relevant aspect of the advertising mix.

Constant improvements on the site ensure accuracy and timeliness of information. During 2002 an emphasis was placed on building the "Utah's Best Destinations" section of the site. These pages provide the user with details of things to see and do in each destination. They also provide listings of all the travel service providers to help travelers more easily plan their vacations.

Projects such as Search Engine updates make certain that [utah.com](http://utah.com) is registered as an information source with every possible search tool. Other ideas being explored include spot buys of banners or links on popular travel sites allowing users access to [utah.com](http://utah.com) on a "click through" basis. [Utah.com](http://Utah.com) currently has over 2,700 top ten listings in the Internet Search Engines. The site also has over 600 keywords that are managed in "pay per click" Search Engines. Search Engines deliver about 25% of the traffic to [utah.com](http://utah.com).

## **How Utah.Com Can Facilitate Destination And Business Interests**

All tourism-related businesses and attractions in the state are entitled to a listing on [utah.com](http://utah.com). Additionally, opportunities exist to enhance communication by participating in marketing opportunities with the site's valuable, targeted audience. Any organization is welcome to buy a link, sponsorship, or banner on [utah.com](http://utah.com). This provides the ability to advertise in a larger arena and, thus, draw from a focused audience that is already interested in Utah. It allows companies or attractions to push a specific place or service when the Web visitor is in a planning mode, rather than the visitor receiving general information at a later time. There are many opportunities to advertise in the lodging section, activities section, etc. In addition, information on Utah events, activities, and attractions forms the structure of the site. If information about a specific area or attraction is not listed on the site, please contact [utah.com](http://utah.com) directly at 801-356-9077 about the possibility of including it.

# Research and Planning Program

Applied research and long-term planning supports the Division decision-making process. The objectives and outputs establish strategic direction, increase cohesion among tourism stakeholders, and inform legislators, local governments, private businesses, and citizens. Research and planning also provides an economic rationale for tourism programs and development, including a framework for local planning as well as outcome and performance measurement.

Three important outputs of the research and planning program are the ***Research Series***, ***Road Map for Destination Tourism***, ***a Long-Range Strategic Plan for Tourism Development***, and the ***Utah! Travel Barometer***.

## **Research Series**

The Research Series consists of all the regular surveys, studies, and statistical profiles completed in-house by the Utah Division of Travel Development or conducted by outside organizations on behalf of the Division. The purposes of the Research Series are:

- To educate stakeholders about the dynamics of Utah's travel industry
- To assist public and private entities in applying research data to improve marketing plans, business strategies, and public policy

Research Series publications can be requested from the Division's office by calling 801-538-1317 or by accessing the Division's online research center at [travel.utah.gov](http://travel.utah.gov).

- **State and County Economic and Travel Indicator Profiles:** This annual publication reports the economic impacts of travel to the state of Utah and each of its 29 counties.
- **Current Visitor Statistics:** Compiled quarterly, these reports document the most recent available information from national and state parks, airports, welcome centers, and hotels.
- **Visitor Profiles:** Compiled every three years, these reports provide detailed information on the demographics, psychographics, and travel patterns of visitors to Utah from domestic and international markets.
- **Utah Skier Survey:** Completed every three years, this report provides a complete analysis of Utah's ski industry, including visitor profiles, economic impact, trends, and industry-specific topics.

- **Economic Report to the Governor: Tourism, Travel and Recreation:** Published in January each year, this report highlights the performance and significant events of the previous year and provides an outlook for the year-to-come.
- **Market Profile Analysis:** An annual publication that synthesizes the most important economic, social, and industry trends.
- **Ad Hoc Studies:** Additional research on tourism-related topics is conducted as resources allow. Examples of ad hoc research conducted in recent years include marketing effectiveness, market prioritization and segmentation, Olympic-related effects, tourism jobs, perceptions and motivations of Utah visitors, and Utah's international image.

## **The Long-Range Strategic Plan**

The Road Map for Destination Tourism is the Division's Long-Range Strategic Plan for Tourism Development. It represents the Division's economic blueprint for tourism strategic action. As a "living" document, the plan is constantly being informally evaluated by the Division's Board and staff, as well as by members of the tourism industry. In 2003, the Travel Development Board will again solicit input, which will be used to update the plan.

The Strategic Plan provides overall direction for the Division and is designed to support and encourage proactive decisions regarding tourism growth and development in all areas of the industry.

## **Marketing Plan/Short-Term Tactics/Current Media Plan**

This compilation of material provides the link between the Long-Range Strategic Plan and task level work conducted by the Division's staff. Each component of this document is updated regularly and the entire document is available on-line at [travel.utah.gov](http://travel.utah.gov).

## **The Utah! Travel Barometer**

This quarterly research and planning newsletter highlights new Division research, trends within the industry, and recent events affecting travel and tourism in Utah. It is distributed to over 1,000 industry partners in government, private industry and academia. To be added to the Barometer's distribution list, call 801-538-1373. Back issues of the Travel Barometer are available on-line at [travel.utah.gov](http://travel.utah.gov).

## **Section IV**



# **The 1,000-Day Plan**



# Travel Utah! – The 1,000-Day Plan

The Division of Travel Development's 1,000-Day Plan for the Olympic and post-Olympic period is a tactical complement to the Division's Long-Range Strategic Plan, and relates to Governor Leavitt's 1,000-Day Plan.

## **Objectives:**

- 1) To Capitalize on awareness bonus of winter Olympics**
- 2) To build a branding bridge between passive awareness and active need to travel for discovery and recovery values**
- 3) To add significant reinforcement to the “quality of life” argument for the Utah Technology Alliance’s branding effort**
- 4) To bring velocity to the state’s economic recovery**

## **Plan Execution --- Four Elements:**

- 1) Qualitative and Quantitative Research**
  - a. Explore dynamics of consumer awareness and image of Utah for improved targeting and messaging
  - b. Probe consumer awareness to obtain “hot button” elements of Games impressions and take-away that can be recalled in future messages
- 2) Paid Media**
  - a. Tie Olympic memories to place-based messages emphasizing the brand values of discovery/recovery, quality of life, and excellent business climate
  - b. Obtain significant levels of reach and frequency in strategic markets through balanced use of all channels to reinforce the message
  - c. Where appropriate, leverage media resources with DBED, local providers, and co-branding partnerships
- 3) Earned Media**
  - a. Continue efforts with global PR function to generate stories in travel and general circulation publications and broadcasting outlets
- 4) Travel Trade Missions**
  - a. Use strategic consideration for travel markets (both mature and developing) in selection criteria
  - b. Integrate travel interests, when feasible, with Governor’s trade mission, schedule and events

- c. If/where travel strategic markets differ with Governor's schedule, invite local travel entities and businesses in travel-themed missions and trade activities

## **Section V**



# *Advertising Utah!*





# Advertising – The Application of Brand Positioning

The Division of Travel Development has been able to refine the *Utah!* Brand by implementing qualitative and quantitative research. From three sets of focus groups, Utah found that respondents seek an escape from their everyday routines, rejuvenation or reconnection to loved ones, and discovery of new experiences. These Brand values of Recovery, Discovery and Escape have since become the foundation for all Division of Travel Development advertising.

In addition, post-Olympic research tells us that Utah's image improved slightly as a result of hosting the Games, and that roughly 7.1 million more adults say they are more likely to vacation in Utah than ever before. Also, Utah is more recognized today for its scenic beauty, mountains, winter sports, ski resorts, cleanliness, and friendly people<sup>6</sup>. Now the task becomes "How do we translate that awareness into visits?" History from other Olympic host cities tells us our window is very short – only three years. The time to act is now.

**The goal of the 2002-2003 advertising is to capture the emotion and excitement generated by the 2002 Olympic Winter Games in Salt Lake City, and to convert that emotion into a desire to visit the entire state.**

## **The Strategy**

- Promote Utah as a year-round destination
- Increase visits to Utah.com
- Increase Utah tourism revenue throughout the state
- Maintain brand continuity between summer and winter campaigns
- Continue leveraging with co-branding and co-op partners

## **Primary Target**

- Adults 25-54
- HHI of \$75,000+
- Frequent travelers interested in certain outdoor activities
- Emphasis on Western States

---

<sup>6</sup> From Wirthlin Worldwide, Measuring the Impact of the Olympic Winter Games on Utah's Image, 2002

## Olympic Advertising Series

In 2000, those who knew of Utah as a vacation destination held it in high regard. But most Americans were still unfamiliar with the tremendous vacation opportunities that awaited them here. However, with the tremendous exposure Utah received from hosting the 2002 Olympic Winter Games, that is no longer the case. Awareness for the state dramatically increased thanks to the Games, and it is now the job of the Division of Travel Development to translate that newfound awareness to potential visitors in a compelling way that will portray our brand values and entice visitors to come to our beautiful state.

### Before the Games:

To capitalize on hosting the Games, the Division of Travel Development used Olympic-influenced advertising long before the Games entered our state. We began by adding the tagline “The official playground before, during and after the 2002 Olympic Winter Games” to all of our advertising efforts. Our Olympic Series advertising began during the 2000 Olympic Summer Games in Sydney. The Division of Travel Development used the reignited interest and passion for Olympic sport to connect emotionally with potential visitors and let them know that the Games would be in Utah in 2002. The campaign consisted of two TV spots titled “Mountains & Families” and “Cowboy Luge” that aired in Los Angeles during the NBC 2000 Olympic Summer Games’ broadcast from September 15 – October 1, 2000.



ILIES



COWBOY LUGE

In the Fall of 2001, Utah was faced with a unique problem. Based on the experiences of other Olympic host cities like Nagano and Atlanta, the Division of Travel Development was concerned that many potential visitors would be worried about the hassles associated with taking a ski vacation in Utah during the 2002 Olympic year. Construction, last minute venue preparations, crowds and other negative perceptions were believed to be impediments to potential visitors. In an effort to ensure that tourism visitation/revenues were maintained in the months leading up to the Olympic Winter Games, the Division of Travel Development ran a TV advertising campaign titled “Slalom” designed to promote tourism during

these months. The campaign ran for 4 weeks (October 29 – November 25, 2001) in Los Angeles, San Francisco and Portland.



### During the Games:

During the NBC broadcast of the 2002 Olympic Winter Games, Utah received more exposure than it had ever received in the past. However, the Division of Travel Development needed to take this newfound awareness and translate that to visitations to the state. In an effort to achieve this goal, the Division of Travel Development created a television campaign titled “Welcome,” featuring the music of U2 “Where the Streets Have no Name” sung by the Children’s Choir of the Madeline. This TV spot played on the emotional connection people had to the Games and then used that connection to extend an invitation to visit the state. The goal was for potential visitors to come away thinking that although the Olympic Games were ending, all the beauty and recreation Utah has to offer were still here for them to enjoy. The campaign ran during the final week of the Games, February 17-24, 2002, including the Closing Ceremonies broadcast in Los Angeles, San Francisco, San Diego, and one spot during the Closing Ceremonies in Salt Lake City.



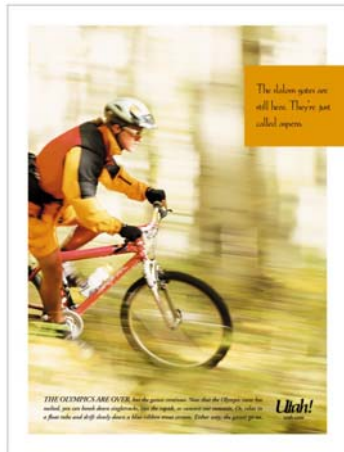
## WELCOME

### After the Games:

With the help of one-time appropriated dollars from the State Legislature, the Division of Travel Development was able to once again capitalize on the emotions of the Games and extend our media presence by airing a revised version of the “Welcome” ad that ran during the Games. The spot was the same except that the U2 music was replaced with a voice over from the most recognized voice of the Olympic Games, Jim McKay. In order to reach the maximum amount of people, and connect emotionally by using the same medium most people experienced the Games through, the Division of Travel Development decided to advertise during, and after, the next big television event, the 2002 Academy Awards. The campaign ran from March 24 – April 7, 2002 in Los Angeles, San Francisco, San Diego, Las Vegas, Seattle and Dallas.

The print campaign that appeared in the Spring of 2002 also played on the emotion of the Games and used the concept “Where Does Olympic Snow Go When it Melts?” This campaign continued to position Utah as the “Official Playground Before, During and After the Olympic Games” and sought to educate people to all the year-round activities Utah has to offer potential visitors. The campaign ran from June – August, 2002 and appeared in the following publications: *Travel Holiday*, *Conde Nast Traveler*, *Sunset*, *Westways* and *Gourmet*. Examples of the creative executions are shown below.





Moving in to the Fall 2002 season, the Division of Travel Development continued to try and capitalize on the exposure generated from the 2002 Olympic Winter Games and attract potential skiers to the state. Although Colorado has enjoyed the largest share of Texan skiers, with the awareness generated from the Olympics there had never been a better time to take skier market share away from them than the Winter following the Games. Therefore, a targeted 3-week television campaign aired in Dallas from November 4 – November 24, 2002 and in Los Angeles (the largest market for visitors to Utah) from December 2 – 22, 2002. The campaign consisted of a :30-second version of the “Welcome” spot, as well as a new spot titled “Seasons.”





## SEASONS

To complement the exposure of the television campaign, Metro Traffic was used in both Los Angeles and Dallas for 4 weeks immediately before the TV campaign aired.

### Utah's Stay & Ski in 2003 Celebration:

In addition to using the one-time appropriated funds for general branding advertising efforts, the Division of Travel Development also provided the advertising for a cooperative promotion with Ski Utah. The promotion, named the "Stay & Ski in 2003 Celebration" continued with the success found with last year's "20.02 Celebration." The campaign consisted of advertising in three ski vertical publications: *Ski*, *Skiing*, *Skier News*. In addition, an Internet campaign with the AMI Group consisting of a micro site, email newsletter sponsorships, and various banner advertisements ran from October through to end of the ski season. The majority of the campaign consisted of a direct mail campaign targeting skiers and snowboarders. Examples of the creative execution are shown below.



### **Winter 2003:**

To further boost the 2002-2003 ski season, additional cable television was purchased in Los Angeles and Dallas to air January 27 – February 16, 2003. Metro Traffic was also purchased in Los Angeles, Dallas and Portland to air from January 27 – February 23, 2003 to further extend our winter invitation to skiers.

### **Spring 2003:**

The Division of Travel Development will seek to gain national exposure through national travel-related magazines. The strategy will continue to use Olympic memories to create awareness of what Utah has to offer the recreational visitor year-round. If additional funds are available, cable television will be considered in select markets.

## **Advertising Accountability – How Do We Know It's Working?**

### **The Message**

Beginning in 1996, the Division undertook a series of unique focus group inquiries designed to inform the advertising message for the *Utah!* Brand. Research was first conducted in 1996 and again in 1999, 2000, and 2002 in selected markets such as Los Angeles, San Francisco, San Diego, Dallas, and New York. After 1996, each round of research also evaluated the current media campaign for relevance and likeability to see if the advertising “hit the mark.”

In each of the rounds of messaging research, respondents have consistently identified three key emotional benefits from leisure and recreational activities:

- **Discovery:** The opportunity to experience new and different sights, sounds, cultures, and experiences; to complement self-awareness, self-improvement, and self-actualization exercises
- **Recovery & Rejuvenation:** The opportunity to recharge batteries (mind, body, and soul) and reconnect with friends and loved ones
- **Escape:** The ability to remove themselves from the grind, stresses, and routines of everyday living

Based on the consistency of the responses from consumers, the creative execution of specific campaigns has attempted to associate the emotional benefits travelers want from leisure and recreational activities with the tourism products and opportunities in Utah.



In addition to gauging consumers' emotional motivations for travel, the focus group research also allowed current campaigns to be evaluated and future campaigns to be pre-tested within a strategically targeted group of consumers. Both print and television advertising have been pre-tested and evaluated. For example, three television concepts were tested for the post-Olympic fall/winter campaign. Based on the strong performance of two of the concepts, production continued with some minor adjustments based on co-evaluation, the Division's advertising target group of consumers.

<b>Hard to Understand</b>					<b>Welcome</b>	<b>Easy to Understand</b>
<b>Irrelevant</b>					<b>Seasons</b>	<b>Relevant</b>
<b>Dislike</b>						<b>Like</b>
<b>Unimportant</b>						<b>Important</b>
<b>Uninformative</b>						<b>Informative</b>
<b>Unbelievable</b>						<b>Believable</b>
<b>Ordinary</b>						<b>Unique</b>
<b>Not Aimed at Me</b>						<b>Aimed at Me</b>

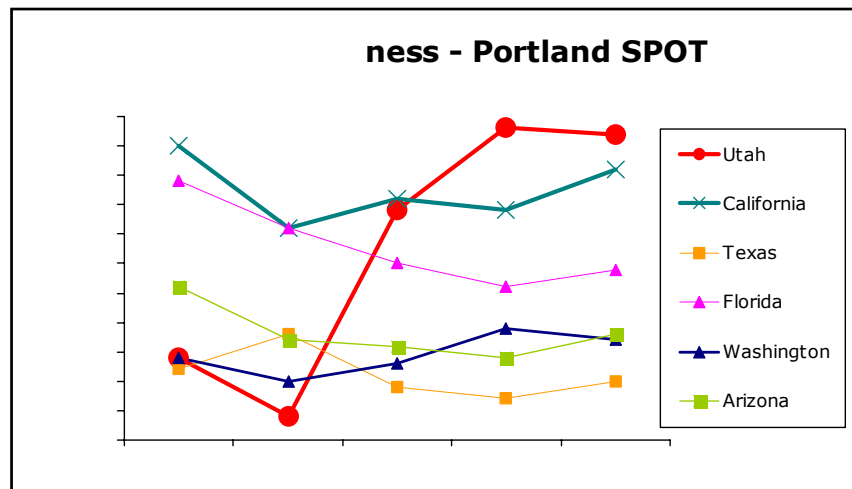
## The Impact

The Division has engaged in a series of research initiatives intended to evaluate the effectiveness of its advertising efforts. Beginning in 2001 and continuing in 2002 and 2003, the UTC has engaged independent contractors to monitor and assess the impact of its advertising messages.

The **2001 Advertising Effectiveness Study** was the first effort of its kind in the state of Utah. Its objective was to identify shifts over time in key persuasion measurements such as awareness, consideration, desire to visit, and intent to visit. Conclusions from the research have helped develop and refine current and future advertising strategies. Key findings from the 2001 study concluded:

- Division advertising was successful at raising awareness in all markets tested
- The Division's spot market television advertising in Portland was particularly successful at raising all key persuasion measurements
- Based on the success of the Portland market advertising, Utah's competitive position was enhanced relative to competing destinations

- Contractor recommended that the state continue to utilize spot market television advertising and where possible, expand such advertising to other nearby feeder markets



Based on the successful results of the limited advertising effectiveness study conducted in 2001, the Division engaged in a more comprehensive evaluation of its marketing effectiveness through a project beginning in Fall 2002 and extending through Spring 2003. The key objectives of this project build on the previous study:

- Measure the impact and effectiveness of the advertising campaigns by focusing on shifts over time in key persuasion measurements
- Measure the incremental travel that could be attributed to the advertising campaign
- Provide an estimated return on investment based on actual or influenced travel to Utah from advertising campaigns
- Track changes in attribute ratings, trip satisfaction, planning sources over time and compare results with competitive states

The Division remains committed to a research-based approach to advertising accountability. Through periodic focus group inquiries, the Division is able to test its message and creative work to maximize its impact among key market segments. In addition, independent surveys conducted on behalf of the Division monitor the actual impact of the campaigns among consumers. Together, they help develop advertising strategies that maximize Utah's effectiveness in the marketplace.

# Coordinating Destination Advertising With The *Utah!* Brand

The Division of Travel Development invites industry partners to use the *Utah!* Brand in their advertising in order to link individual destinations and attractions with the known concept of the *Utah!* Brand. Guidelines on how to use the *Utah!* Brand are found in the *Utah!* Brand Style Guide, available on-line at [travel.utah.gov](http://travel.utah.gov) .

## Advertising Co-Branding

Co-Branding is an advertising partnership with just two partners, where both entities want to speak to the same audience of consumers. In co-branding, neither message distracts from the other, rather each message benefits from the association with the other.

Over the past few years, the Division, on behalf of the state of Utah, has been co-branding with national brands. These partnerships are an ideal way to combine brands and have both entities benefit together more than they would alone. The corporate partner or brand receives the benefit of being associated with the *Utah!* Brand image, and enjoys an implied “endorsement” from the state. Utah benefits from increased visibility among consumers, particularly those loyal to the partnering brand. Utah also benefits because a co-brander brings additional dollars to a campaign, which increases the frequency and reach of the advertising.

## Advertising Co-ops

In an Advertising Co-Op, two entities match money in order to produce ads, which take advantage of the synergy associated with a particular Brand, while promoting a very specific product.

An Advertising Co-Op between the Division of Travel Development and a partner (or more than one partner) provides an effective method of increasing out of state awareness of the *Utah!* Brand, as well as awareness of specific destinations within the state. As such, co-op advertising presents a “win – win” situation. In co-op advertising, the *Utah!* Brand message is recalled, ie logo, web site, but the main message is specific to a destination, area, attraction, or event. Ideal

partners for co-op advertising with the Division include local destination management organizations, counties, chambers of commerce, or non-profit organizations.

On-going dialogue with the Legislative Branch of Utah State Government recommends that money appropriated by the 2003 Utah Legislature to the Tourism Marketing Performance Fund be used to create opportunities for co-op advertising outside of the state. Legislators view co-op advertising as an excellent way to improve coordination, and cooperation between the Division of Travel Development and government agencies and destination attractions across the state.

## Current Advertising Campaign

### Utah Travel Council Spring/Summer Media Summary

#### Magazine

American Heritage	April	\$46,500*
Art Frommer's Budget Travel	May	\$20,367
Biography	May	\$34,627
Conde Nast Traveler	May	\$80,083*
Gourmet	May	\$53,914*
MNI News Network	June	\$79,225
The New Yorker	June	\$59,200
Travel Holiday	April	\$57,680*
*committed		
		<b><u>\$431,596</u></b>

#### Television

Las Vegas	May 5-25	600 TRPs	\$124,200
Sacramento	May 5-25	600 TRPs	\$102,000
			<b><u>\$224,400</u></b>

#### Cable

Los Angeles	May 5-25	500 cable TRPs	\$52,754
Phoenix	May 5-25	500 cable TRPs	\$50,000
			<b><u>\$102,754</u></b>

#### Metro Traffic Radio

Las Vegas	May 5-25	375 spots	\$13,500
Los Angeles	May 5-25	425 spots	\$35,000

Phoenix	May 5-25	375 spots	\$18,000
Sacramento	May 5-25	375 spots	\$25,500
			<b><u>\$91,980</u></b>

#### **Internet**

MountainReports.com	April, May, June, July		\$15,300
			<b><u>\$15,300</u></b>

**Total: \$866,030**

### **Utah Travel Council Spring/Summer 2003 Media**

March 4, 2003  
Revised

#### **I. Media Objectives & Strategies**

##### **A. Media Objective**

To capitalize on the exposure gained from hosting the 2002 Olympic Winter Games and ensure that tourism visitation/revenues continue to grow at a steady rate even a year after the Games are over.

To create a targeted and efficient media schedule based on limited budget allocation that will allow the Utah! Brand values of Recovery, Discovery and Escape to reach our target prospect.

To promote summer travel to Utah as well as stimulate response to the utah.com website.

##### **B. Media Strategy**

Create an effective media presence that communicates the Utah! Brand message and informs potential tourists of the broad array of unique scenery and activity that Utah offers.

Media will be chosen that effectively targets the leisure traveler and keeps in mind the changes in travel behavior patterns seen in market. With the continued uncertainty with the economy and the war on terrorism (including Iraq), the most noticeable changes in travel behavior include:

- Shorter trips closer to home
- Less air travel and more drive traffic
- Reduced spending
- More interest in making connections – with family, nature, heritage and culture
- More interest in outdoor recreation and travel to rural America
- Shorter planning and booking cycles

In addition, co-branding opportunities will be explored where effective.

## II. Media Planning Parameters

### A. Target Audience

The following demographic group represents the core target of the plan:

Travelers who are interested in the activities offered in Utah during the summer including sightseeing at National Parks, white water rafting and mountain biking. These people are active adults, often with families, are affluent (Household income \$75,000+) and enjoy activities while on vacation.  
Age: Adults 25-54

### B. Geography

We will focus on markets with easy access to Utah. Western states with less than a three-hour direct flight or within driving distance. California markets and the states surrounding Utah will receive the greatest concentration of media. This is consistent with summer travel to Utah in past years. In addition, due to 9/11 and the unease in the middle east, travelers are driving more, taking shorter, direct flights and taking shorter vacations.

### C. Seasonality

The media plan is being developed for Spring/Summer 2003. Timing will be April, May, June and July to coincide with the current shorter planning travel atmosphere.

### D. Budget

A gross media budget of \$800,000 - \$850,000 has been allocated for this effort.

### III. Media Plan Description

#### A - Media Selection

The following elements have been considered for use in the UTC media plan based on the specific characteristics of each medium:

*National Magazine* - Allows us to be target specific in reaching upscale adults who are frequent travelers and participate in the type of active vacations that Utah offers. Magazines will also be chosen that skew toward the Western States. Full-page ads will allow us to show the beauty of Utah while portraying our brand message. We will utilize premium placement and special sections to help break through the clutter. Occasionally, co-branding partners consistent with the Utah brand will be secured to increase exposure and offset expenses. This tried, tested and true tactic has been successful for branding in the past. In addition, we are solidifying our relationship with New Balance as well as forming new relationships with key national brands. Added value opportunities including additional magazine space, advertorial, web presence, reader service, database lists and contesting will be utilized to increase exposure and value.

*Spot Television* - Television has the ability to generate awareness quickly and the flexibility to geographically reach the UTC target. A selective daypart mix allows this medium to be both impactful and efficient.

*Cable* - Cable television has the ability to target geographically to specific lifestyle segments. Its affordability makes it possible to create impact in large marketplaces very efficiently.

*Metro Traffic Radio Sponsorship* - Radio offers immediacy and geographic flexibility. The most desired characteristic radio offers is the ability to add message frequency within a selected market more efficiently than any other medium.

*Internet* - Travel and activity sites offer numerous creative ways to reach our target audience. The Utah Travel Council has developed a strong relationship with one of the key outdoor Internet providers, The AMI Group. MountainReports.com is the largest producer of mountain travel content for radio stations and new media in the world. We have just come off of a

successful winter campaign with this group (OnTheSnow.com), and plan to utilize them for their strength in marketing to travelers seeking a mountain vacation experience.

## B - Broadcast Market Recommendation

The media markets that will be included in the execution of the media plan are those considered to have the greatest potential for the UTC listed in order of budget priority. This selection is based on historical visitor information, demographic profiles and media efficiency. These markets are:

Los Angeles  
Las Vegas  
Phoenix  
Sacramento

### Los Angeles

DMA Rank: 2  
Total Adult Population: 11,854,108  
Median Age: 46.4

<u>Lifestyle characteristics</u>	<u>Index</u>
10.9% snow ski frequently	125
30.8% are frequent flyers	124
56% use a personal computer	107
12.3% have an income of \$75,000+	111
19.1% use a credit card for travel and entertainment	139
22.3% attend cultural/arts events	117
63.2% have cable	94
35.3% travel for pleasure/vacation	101
27.9% participate in camping/hiking	100
20.4% fish frequently	100
High Hispanic population: 40.4% of residents	318
High Asian population: 11.3% of residents	276

Average TV CPP: \$1,134  
Average Cable CPP: \$90 (from a recent purchase – cable universe of 595,700)

### Las Vegas

DMA Rank: 52  
Total Adult Population: 1,094,054



Median Age: 47.4 years

<u>Lifestyle characteristics</u>	<u>Index</u>
9.6% snow ski frequently	110
27.7% are frequent flyers	111
54.8% use a personal computer	105
12.2% have an income of \$75,000+	110
15.5% use a credit card for travel/entertainment	113
17.7% attend cultural/arts events	93
71.3% have cable	107
33.6% travel for pleasure/vacation	96
29.6% participate in camping/hiking	106
24.8% fishing frequently	82
Hispanic population: 22.1% of residents	174
Asian population: 6.4% of residents	156

Average TV CPP: \$168

### **Phoenix**

DMA Rank: 16  
Total Adult Population: 2,943,291  
Median Age: 47.4 years

<u>Lifestyles characteristics</u>	<u>Index</u>
13.1% snow ski frequently	106
30.7% are frequent flyers	118
55.4% use a personal computer	105
12.3% have an income of \$75,000+	97
11.9% use a credit card for travel/entertainment	101
19.3% attend cultural/arts events	107
61.1% have cable	90
33.9% travel for pleasure/vacation	98
43.7% participate in camping/hiking	131
33.0% fish frequently	90
Hispanic population: 23.2% of residents	183
Asian population: 2.1% of residents	51

Average TV CPP: \$304

### **Sacramento**

DMA Rank: 19  
Total Adult Population: 2,442,110

Median Age: 47.4 years

<u>Lifestyle characteristics</u>	<u>Index</u>
12.2% snow ski frequently	140
22.0% are frequent flyers	88
54.7% use a personal computer	104
11.1% have an income of \$75,000+	100
12.1% use a credit card for travel/entertainment	88
18.5% attend cultural/arts events	97
54.7% have cable	104
32.3% travel for pleasure/vacation	92
38.9% camp/hike	139
31.4% fish frequently	104
Hispanic population: 20.3% of residents	160
Asian population: 9.2% of residents	224

Average TV CPP: \$139

#### C - Plan Details

##### ***Magazines -***

Riester~Robb has been in continual contact with national publications to solicit proposals for co-branding, co-ops and added value to extend our advertising exposure. In addition, we have analyzed MRI and MMR research on over 30 magazines, which editorially fit our target audience. Magazines were then evaluated by co-branding opportunities, geographic reach in the West, CPM, added value exposure, value vs. cost, as well as MRI research measuring income, travel potential, online usage and interests. Based on these factors, we narrowed our selection down to the following publications for this Spring/Summer campaign:

*American Heritage*  
*Art Frommer's Budget Travel*  
*Biography*  
*Conde Nast Traveler*  
*Gourmet*  
*MNI News Network*  
*(US News, Sports Illustrated, Newsweek, Time)*  
*The New Yorker*  
*Travel Holiday*

### *American Heritage*

*American Heritage* offers a relevant and affluent group of travelers who are interested in the history, heritage and culture of their travel destinations.

Circulation: 346,000

Rate Base: 340,000

- HHI \$75,000+: 202 Index
- Outdoor activities on vacation: n/a
- Visited UT or CO in past year: 190 Index
- Visited West in past year: n/a
- 4+ domestic trips: 190 Index
- Used Internet for travel: n/a

April/May Issue

Special Historic Travel Issue

- UTC spread, 1 full-page, right-hand read, adjacent to inside front cover
- Partnered with Grand America - Inside Front Cover

Added Value

- Reader Service Listing
- Listing and banner on [www.americanheritage.com](http://www.americanheritage.com)

Total Value: \$61,025 (75% of rate card)

Total Cost: \$46,500

### *Art Frommer's Budget Travel*

*Budget Travel* offers the seasoned traveler insights into budget conscious methods of vacationing, without cheapening the experience or feel of the destination.

Circulation: 517,567

Rate Base: 500,000

- HHI \$75,000+: 163 Index
- Outdoor activities on vacation: 164 Index
- Visited UT or CO in past year: n/a
- Visited West in past year: 182 Index
- 3+ domestic trips: 176 Index
- Used Internet for travel: 194 Index

June Issue

1-page

- Premium positioning next to "Letters to the Editor"

#### Added Value

- Reader Service Listing, with brief description, and card
- Link on website – includes brief description

Total Value: \$28,000

Total Cost: \$20,367

#### *Biography*

*Biography* offers an affluent and historical look at travel targeted to an intelligent and celebrity-focused traveler.

Circulation: 724,550

Rate Base: 700,000

- HHI \$75,000+: 116 Index
- HHI \$75,000+ (women): 152 Index
- Outdoor activities on vacation: 112 Index
- Visited UT or CO in past year: 123 Index
- Visited West in past year: 116 Index
- 3+ domestic trips: 110 Index
- Used Internet for travel: 154 Index

May Issue (commitment to September as well)

#### Within the Travel Advertorial Section

“Summer Movie Escape” – special section

- UTC full-page/4 color
- Adjacent full-page custom advertorial

#### Added Value

- Bonus Space listing in “AllForYou”
  - Located at the front of each issue, can be used for a special advertising message or offer to readers
- Additional page promoting travel contest sweepstakes with Utah mentioned as a sponsor
- Contest sponsor – winner receives an all expense paid road trip to one of the featured destinations
- Micro site – link to an interactive site themed around “Summer Movie Escape”. Utah featured as a sponsor. Includes logo, photo and link to our site. [www.INSIDEbio.com](http://www.INSIDEbio.com) will be ‘live’ for three months with this promotion
- On-air promotion – 30 minutes of A&E Television Network time. Utah will be tagged on this :30-second promotional spot as a sponsor of the magazine travel contest
- Reader Service Listing

- Overruns/reprints – UTC will receive 1,000 reprints of each special section if desired

Total Value: \$168,000 (4.8x the cost)

Total Cost: \$34,627\*

\* 1x cost based on a commitment to run the same effort in September with their “Star Travel” issue

### **Conde Nast Traveler**

*Conde Nast Traveler provides experienced travelers with diverse travel experiences. The demographics fit Utah’s target income, activities, geography and past travel to Utah. We will partner with New Balance Shoes and Apparel, which continues the relationship with a category relevant to the outdoor focused vacation activities in Utah.*

Circulation: 780,952

Rate Base: 750,000

- HHI \$75,000+: 198 Index
- Outdoor activities on vacation: 154 Index
- Visited UT or CO in past year: 190 Index
- Visited West in past year: 187 Index
- 3 + domestic trips: 172 Index
- Used Internet for travel: 265 Index

June ‘Hot List’ Issue

4-page section partnered with New Balance

- 1-UTC full page, 2 pages editorial combined with New Balance, 1-page for New Balance (they supply their creative)

Added Value

- Yet to negotiate – they are willing to do whatever we would like

Value: \$164,110 (2.0x the cost)

Cost: \$80,083

### **Gourmet**

Circulation: 950,000

Rate Base:

- HHI \$75,000 +: 171 Index
- Outdoor activities on vacation: 127 Index

- Visited UT or CO in past year: 104 Index
- Visited West in past year: 142 Index
- 3 + domestic trips: 141 Index
- Used Internet for travel: 199 Index

#### May "All Travel" Issue

4-page section with editorial

full-color spread

2-pages of editorial (must say 'advertisement' at the top of each advertorial page)

Added Value (choose four of the following):

Gateway Sweepstakes

Banner on Epicurious.com

e-mail blast

Gourmet.com website exposure

Direct mail campaign

Gourmet Reports on Travel (to agents)

Reader Response Cards - listing

Bonus Program: Gourmet Site Seeing web listing

Value: \$322,087

Cost: \$88,820

#### MNI Network (US News, Sports Illustrated, Newsweek, Time)

Network Targeted Circulation: 330,650

(Long Beach, Beverly Hills, Sacramento, Portland, Las Vegas)

MNI News Network (average all four publications)

- HHI \$75,000 +: 132 Index
- Outdoor activities on vacation: 136 Index
- Visited UT or CO in past year: 116 Index
- Visited West in past year: 120 Index
- 3 + domestic trips: 140 Index
- Used Internet for travel: 152 Index

#### June x Issue

Full-page/4C in one issue of each magazine

Added Value: TBD

Cost: \$79,225

## The New Yorker

The New Yorker *contains unique ideas about travel and adventure. The New Yorker provides Utah the unique combination of the immediacy of newspapers in reaching its audience, with the sustained impact of a magazine. The New Yorker's demographic fits Utah's target income, activities, and travel propensity. They under-index in visits to Utah or Colorado, which gives us the opportunity to speak to an untapped reader.*

Circulation: 924,745

Rate Base: 875,000

- HHI \$75,000+: 160 Index
- Outdoor activities on vacation: 145 Index
- Visited UT or CO in past year: 87 Index
- Visited West in past year: 140 Index
- 3 + domestic trips: 152 Index
- Used internet for travel: 187 Index

June 16

Summer Fiction Double Issue

### 4-page Travel Section

- One (1) full page ad – UTC exclusive
- Two (2) advertorial pages integrated with a partner\*

### Added Value

- Sweepstakes program on the RSVP page and website  
Includes:
  - Bonus space in book to promote sweepstakes
  - 1 customized sweepstakes opportunity where winner received trip for two to Utah
  - call to action to visit [utah.com](http://utah.com) on banner ad and in book
  - creation of database
  - three bonus RSVP listings to promote travel to Utah

Value: \$235,280

**Cost: \$59,200**

\*the Patagonia partnership will be solidified once we have opted in on this proposal

### *Travel Holiday*

*Travel Holiday* offers a relevant and affluent look at travel targeted to the travel enthusiast. Special sections are full of useful travel information designed to assist their readers in planning their trips.

Circulation: 657,883

Rate Base: 650,000

- HHI \$75,000+: 114 Index
- Outdoor activities on vacation: 113 Index
- Visited UT or CO in past year: 95 Index
- Visited West in past year: 164 Index
- 3+ domestic trips: 123 Index
- Used Internet for travel: 192 Index

### April Issue

4-page Utah co-op section

- UTC inside front cover spread
- Two pages advertorial

### Added Value

- Exposure in Travel News
  - 1/3 4C page, includes copy and visual – UTC to provide contentReader Service Listing – includes copy, 800# and/or web address plus BRC
- 3x reader services listings
- feature on website
- access to Destination Rewards Club members

Total Value: \$230,720 (4x the cost)

Total Cost: \$57,680

### ***Television –***

**Flight dates: May 5-25**

Three weeks

TRPs: 200 per week / 600 Total

### Daypart mix:

Early Morning	10%
Early News	25%
Prime Access	20%
Early Fringe	20%
Late News	25%



Market	Mix CPP	Estimated Reach	Estimated Frequency	Total Cost
Las Vegas	\$207	55%	3.7x	\$124,200
Sacramento	\$167	66%	4.1x	\$100,200

### ***Cable -***

We recommend purchasing specific zones within the interconnect system that will target upper income (\$75K+) and areas that index high in propensity to travel domestically. Based on demographic and qualitative reach, the following cable networks and systems are recommended:

- Animal Planet
- CNN
- Fox News
- Comedy
- Discovery Channel
- Travel Channel
- ESPN-TV (includes NBA)
- ESPN2 (includes NBA)
- Nickelodeon
- TNT (includes NBA)
- VH1

### **Los Angeles**

Total # of spots: 2167 (112 of these are fixed sports)  
Flight dates: May 5-25 (3 weeks on-air)  
Total HHs: 643,000

Cost: \$52,754

### **Phoenix**

Total # of spots: 1250  
Flight dates: May 5-25 (3 weeks on-air)  
Total HHs: 665,000

Cost: \$50,000

### ***Traffic Sponsorships -***

These short reminder messages will be placed in conjunction with the television campaigns to add substantial impressions in the key markets selected. Schedule will be placed during a four-week period in order to give us an effective

reach/frequency over an extended period of time. We will begin prior to Labor Day weekend in order to elicit a last minute response of close-in travel.

Flight dates: May 5 - 30

Market	# of Spots	Estimated Reach	Estimated Frequency	Total Cost
Los Angeles	488	54%	4x	\$34,920
Las Vegas	438	61.4%	3.8x	\$13,520
Phoenix	375	43.4%	3.9x	\$18,000
Sacramento	415	55%	4.5x	\$25,540

(each spot total contains 75-100 bonus spots per market)

### ***Internet -***

Target potential customers with e-mail newsletters, targeted buttons and banners and Utah specific integrated text links. We have great flexibility with this medium to create special offers for potential travelers while they are planning their mountain vacation. All ads are directly linked to utah.com for information, routing and tracking. We have one opportunity per month to speak directly to 115,000+ subscribers in a newsletter associated with travel and outdoor adventure.

MountainReports.com

MountainReports.com Newsletter

- Four e-mails distributed April, May, June and July
- Offers travel vacations and packages to an opt-in list
- Title sponsorship with 50-70 words of copy and photo
- 115,000+ per e-mail (345,000 total)

Targeted Banners

Minimum 400,000 impressions

Targeted Buttons

Minimum 400,000 impressions

Integrated Text Links

Integrating into Utah specific sections of MountainReports.com.  
The link will drive visitors to utah.com. Minimum 300,000 impressions.

Total Cost: \$15,300

**Budget**

Magazine	\$431,596
Television	\$224,400
Cable	\$102,754
Metro Traffic Radio	\$ 91,980
Internet	\$ 15,300
<b>Total</b>	<b>\$866,030</b>

\*All costs are for planning purposes only and reflect only partially negotiated media rates.

## Advertising Direction – Fiscal 04

The Division of Travel Development's 1,000-Day Plan is in the final execution phase. While the goals of the 1,000-Day Plan, as updated, remain viable, expect advertising messages will reflect diminishment of Olympic references.

In addition to our long-standing effort to target visitors who spend more and stay longer, the Division's advertising will target those individuals and families who will be traveling closer to home. Also, because of continued uncertainty in the economy and world situation, we will target visitors who tend to be independent in their travel habits.

With marketing resources and media buying power at an all-time low, expect a reduction in the frequency and reach of the *Utah!* Brand message. However, FY 04 advertising will demonstrate some interesting methods of targeting visitors, and new media outlets used to reach them.

Advertising during FY 04 will most likely include print, radio, and Internet advertising in warm weather and winter campaigns. Regional and DMA-targeted mediums will be used whenever possible to ensure accurate delivery of *Utah!* Brand messages.

It is not likely that any new video creative will be produced during this fiscal year, but subject to testing, existing television spots may be aired on carefully selected cable networks.

The Division expects to be flexible enough to take advantage of favorable situations and trends, as well as other opportunities that may arise to promote the *Utah!* Brand in unique and effective ways.

***Utah!***  
*Where Ideas Connect*

**Utah Division of Travel Development  
300 N. State Street, Salt Lake City, UT 84114  
801-538-1030**